GOVERNMENT EDITION

Release 2.2 User Guide

Part 1 – Using E Team

Prepare better. Respond faster. Recover sooner.

Contents

FIGURES

Introduction

About E Team

E Team was designed by experts in emergency and event management to provide comprehensive functionality for all critical tasks associated with emergency management, facility and event security, disaster preparedness and recovery, and business continuity. E Team enables its customers to prepare better, respond faster, and recover sooner whenever and wherever public health and safety, the environment, or business assets are at risk.

E Team provides a common operational interface for all tasks, reports, and map views, ensuring that all users are on the same page when creating, viewing, or distributing information.

E Team is available in ASP, self-hosted, and replicated models for maximum flexibility in procurement, implementation, and support. E Team servers are fully redundant at multiple sites to protect your critical data. E Team's Web-based infrastructure remains operational when other communications systems are damaged, destroyed or limited by sightlines or spectrum. E Team supports SSL for secure data traffic, and offers optional wireless delivery for greater mobility in field operations.

What's New

Revised Incident Report Form. The new Incident form is more intuitive and quicker to complete. The Quick Entry mode captures only the most critical information, for situations where time is of the essence. Full Entry mode provides comprehensive information capture. In addition, users can now access all related reports and incidents with the click of a button.

Customizable Menus. This new feature greatly simplifies E Team and allows even untrained users to navigate with ease through the application. System administrators can set up agency-specific menus based on the reports and views most commonly used. Unwanted functionality can be hidden. The traditional full E Team menu is also available and can be modified.

All Reports Views. New views have been added to the system to provide users with an at-a-glance view of all forms within the system.

My Reports Views. The My Reports views provide individual users with two new views, one displaying all reports that have been assigned to them, and one displaying all reports that they have created.

Enhanced Responsibility Assignment. The new responsibility fields on each form allow users to assign responsibility for a form or task at any level, including Individual, Position, Agency, Organization, and ICP.

Event Relationships. This new feature provides authorized users the ability to relate or unrelate reports throughout E Team to a single Event from within that Event Report.

Simplified Map Viewing. In this release, E Team has eliminated the multiple map views found under each report type and replaced them with a single map view that is accessed by clicking on an icon tool in the top window of the main frame. When first accessed, each user will have the ability to set up their own map view by selecting which dynamic mapping layers and report icons they wish to display.

XML Interface. The XML interface allows external systems to integrate with E Team using industry standard XML. Systems such as trigger sources or CAD systems can now pull data from and push data into E Team.

What's Changed

Situation Summaries. The Situation Summary updates within E Team are now saved as separate documents, allowing for multiple, simultaneous updates to Incident Reports, Jurisdiction SitReps and Agency SitReps. Each entry is stamped with the date, time, and user's name and is viewable in a new scrollable window.

Resource Request Prioritization. A priority field has been added to the resource request.

Agency Reporting. The restriction on creating single agency reports has been removed, providing a way for agencies to report readiness and cost data specific to each Event.

Jurisdiction Reporting. Users now have the option of updating PA Damages automatically by pulling in damage totals from Agency reports with the click of a button. In addition, a view has been added that can be accessed from within the report to display all other reports related to the Incident or Event selected. Finally, Jurisdiction views will all roll up to the top level Jurisdiction by Event.

Tasking. The Task and Sub-Task forms have been enhanced and streamlined, adding an optional approval feature and giving customers the option to choose whether or not to use the Action Request and Plan Concern forms.

Notification Groups. In this release, users have the ability to select Group members from the Directory while continuing to allow the manual addition of members, when necessary.

Viewing Attachments. The new View Attachments text link has been added at the top of all E Team reports to alert users that attachments exist. Clicking on this link will drop the user into the attachments section of the report.

Updating Reports. The label on the *Modify* buttons has been changed to *Update* throughout the system to better define the purpose of the button. You now press ***Update*** to edit a document.

Document Locking Override Enhancement. This feature provides authorized users the ability to release document locks from within the existing document locking screen. It also provides a notice to the user currently editing the document.

Online Help. The online help documentation now includes detailed information for each field, including the specific action they must take to enter or update data and the purpose of the field. Field help is found under Working With Reports.

How To Use This Manual

Part 1

Part 1 of this manual should be used to familiarize yourself with how E Team works and includes all the information you need to:

- Navigate throughout the application.
- Identify and complete common report elements.
- Create, view and update reports.
- Share data with other E Team systems.
- Use RealTime Messaging to communicate with other E Team users.
- Use the E Team mapping features.
- Geo locate reports on the map.
- Create map overlays.

Part 2

Part 2 of this manual should be used to familiarize yourself with the individual reports contained within the E Team application and how they relate to each other. Each report section contains field-by-field help including field name, action required by you, the purpose of the field, and how it is used within E Team.

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Part 1 - Using E Team

Before You Get Started

The E Team application was designed to enable your organization to run practice and training exercises without interfering with normal system operation. The Training and Operations systems are completely independent of each other and require separate login. Documents created in one system WILL NOT be available from within the other. The choice between the Training and Operations system is made by selecting the appropriate button from the *E Team Welcome Screen* prior to login.

E Team contains many configurable components, allowing your system to be set up to best meet the needs of your organization. Your System Administrator generally completes configuration during the installation and setup process, however, these settings can be changed at anytime. Some of these configurable components include:

- **Access Levels** – E Team users are each assigned a level of access. This access relates directly to the ability to perform certain functions within the E Team application. For example, you may be able to read reports of a certain type, but you may not have the authorization to update them. Throughout this document you may see references to navigation items, buttons or fields within forms that you do not see on your screen which means that you have not been given access rights to this data.
- **Menus and Views** – E Team is delivered with a standard Full Menu and a Quick Menu that contains all report types and views. Each menu can be configured to hide reports and views not generally used by your organization.
- **RealTime Messaging (RTM)** – RTM is an optional feature. If this feature is enabled on your system, you will be required to sign on to RTM after system login. Users with RTM may have message windows pop-up on screen during the normal course of operation. These windows will not interfere with normal system operation. You may choose to join in the chat or close the window as necessary at anytime.
- **Profiles and Checklists** – The appearance of your *Personal Profile* document and *Position Checklists* at login are dependent on settings made by your system administrator. If you do not see these documents at login, you can access them from the *Tool Frame* after login.
- **Data Sharing** – E Team enables you to share documents with users on other E Team systems. It is the responsibility of your E Team system administrator to configure your system to enable E Team-to-E Team Data Sharing.

- **Keyword Lists and Status Definitions** – Some E Team report fields require that you select data from a predefined list of options or color-coded statuses (e.g., *Incident Type or Status)*. The options available in these lists are defined by your system administrator.

E Team provides for the automatic distribution of *Alert Bulletins*. During the normal course of operation, bulletin windows may pop-up on your screen. These windows will not interfere with normal system operation. You can read and then close the bulletins at anytime. Bulletins can always be accessed again using the Alert views.

Reports Overview

E Team reports are divided into categories to better help you locate which report(s) you need in the course of your duties.

Event/Incident

- **Event Reports** - Event reports allow users to tie all the other reports in the system together to make it easier for after action reviews, reimbursement, and situational awareness. The Event Report allows users to document and update critical information about the event. Event reports can be posted to the E Team map. There are two major types of Events in E Team: Planned and Emergency.
  - ✓ **Emergency Events**: Emergency Events are emergencies such as a major flood, tornado, hurricane or earthquake. Events are often the cause of incidents, or have multiple incidents related to them.
  - ✓ **Planned Events**: Planned Events are events that are anticipated and prepared for. They are typically not emergencies, but have the potential to become one. Examples of Planned Events are large political conventions, large-scale sporting events such as the Olympics, or music festivals.
- **Incident Reports** - Incidents are localized emergencies such as building collapses or HAZMAT spills. Often they are a result of a larger Event, such as a flood, hurricane, earthquake, etc. The Incident Report captures critical information about the incident itself. Some of the data elements collected are status, prognosis, type, location, lead agency, description, impact on infrastructure, and casualties. Incident reports can be posted to the E Team map.
- **Planned Activity Reports** - A Planned Activity is typically small and localized as well as planned and anticipated. Examples of Planned Activities are protest marches, political rallies, a major sporting event, etc. Planned Activity Reports are designed to capture critical information about the Planned Activity. Some of the data elements captured are status, prognosis, start and end times, lead agency, and critical issues. Planned Activity Reports can be posted to the E Team map.
- **Medical Incident Reports** - A Medical Incident Report is a specialized type of incident report. It can be used to define and track critical medical information. Medical Incidents can be posted to the E Team map.
- **Alert Bulletins** - The Alert Bulletin is used for providing E Team users with broadcasts of important information. When an Alert Bulletin is created, a broadcast is sent to all E Team users via a small browser pop-up window. Users can read the information and close the window when finished. Users will only see the bulletin once, unless they log out or restart their browser. The ten most recent Alert Bulletins are displayed in the Alert window.

Infrastructure

Infrastructure reports and are designed to give users an infrastructure overview of the jurisdiction concerned. The reports are designed to gather specific information on various types of infrastructure.

- **Hospital Reports** - Hospital reports are designed to keep track of an individual hospital or medical facility's capacity to accept and treat victims of an emergency. Some of the critical data elements collected are (a) capability to accept victims, (b) number of personnel available broken out by specialty, (c) bed space available broken out by type, and (d) contact information. Hospital reports can be posted to the E Team map.
- **Public Facility Reports** - Facility reports are designed to keep track of the status of critical facilities that may be affected by an emergency. Some of the critical data elements collected by the report are (a) name of facility, (b) status, (c) contact information, and (d) estimated damage. Facility reports can be posted to the E Team map.
- **Road Closure Reports** - Road Closure reports are designed to keep track of the status of roads and the effect that damage or disruptions may have on traffic flow. Some of the critical data elements collected are (a) the name of the road, (b) direction in which closed, (c) cause of closure, and (d) contact information. Road Closure reports can be posted to the E Team map.
- **Shelter Reports** - Shelter reports are designed to assist organizations in the task of managing multiple evacuation shelters. The Shelter report accomplishes this task by capturing critical information on individual shelters. Some of the data elements captured are (a) status of shelter, (b) number of people sheltered, (c) remaining capacity, (d) location, (e) special services available, and (f) contact information. Shelter reports can be posted to the E Team map.
- **Transit System Reports** - Transit System reports are designed to keep track of the status of mass transit systems. Some of the critical data elements collected are (a) overall status, (b) number of commuters affected, (c) estimated time of restoration, and (d) contact information.
- **Utilities Outage Reports** - Utilities Outage reports are designed to keep track of the status of utility service for a specific geographic area. Some of the critical data elements collected are (a) overall status, (b) number of customers without service, (c) cause of disruption, and (d) contact information.

Resources

Resource reports are designed to assist you in the tasks of resource requests, tracking and fulfillment, and critical asset management.

- **Resource Requests** - The Resource Request Report is designed to facilitate the task of requesting and providing resources. The Resource Request report allows users at an agency or a command post to request resources and then to forward that request to the next agency in their request chain. E Team takes into account that a request may have to be passed through several agencies, often at different levels of government, before it finally reaches an agency or private sector organization that can actually provide the resource. E Team also recognizes that the resource request process is not complete until the resource actually arrives on scene. Thus, E Team can be used to track the receipt and deployment of the resource. Resource Request reports can be posted to the E Team map.
- **Critical Asset Reports** - The Critical Asset Report addresses the issue of locating all the available assets necessary to respond to a disaster. This powerful tool gives organizations the ability to determine asset location and availability quickly from other organizations statewide or regionally. Some of the data elements captured in the report are availability of asset, asset ID, owning agency, location, and contact information. Critical Asset reports can be posted to the E Team map.

Situation

Situation Reports give you the ability to create summary reports that provide a comprehensive assessment of the overall situation. Unlike other reports in E Team the Situation Reports deal in generalities that are suited to the needs of executive level managers, elected officials, and the media.

- **Jurisdiction Situation Reports** - The Jurisdiction Situation Report is designed to summarize key information found in other areas of E Team. The focus of this report is to provide current information in a generalized format for a particular political jurisdiction such as a State, County, or City. The report focuses on the big picture such as the number of buildings destroyed, whether there has been a disaster declaration, and the fiscal impact of a disaster. This report is ideally suited to the needs of senior executives and elected officials.
- **Agency Situation Reports** - The Agency Situation Report is designed to capture information related to the overall capabilities and fiscal expenditures of a specific agency during a disaster. This report is useful for developing a big picture perspective of the impact of a disaster on an agency's ability to perform response operations. Additionally, the report provides a foundation for determining the fiscal impact of responding to and recovering from a disaster.
- **Intelligence Reports** - The Intelligence Reports are designed to provide both summary and detailed information on terrorist threats.
    - ✓ **Intelligence Summary** – The Intelligence Summary Report provides a high level summary of threats and provides links to more detailed information about terrorist organizations and threats to locations.

  - ✓ **Location Intelligence** - The Location Intelligence reports provide threat information specific to a location.
  - ✓ **Entity Intelligence** - The Entity Intelligence reports provide information about specific terrorist organizations and provide links to information about members of those organizations.
  - ✓ **Biography Intelligence** - The Biography Intelligence reports provide information about known terrorists, including photographs if available.
- **Tip Report** - The Tip Report is designed to record information received and categorized as a tip. This report allows you to prioritize and classify tips received. Collection and distribution of this information can be critical to an ongoing investigation.
- **Corporate Situation Report** - The Corporate Situation report is designed to gather information from major private employers within an area impacted by a disaster. The information provided by this report is useful in analyzing the economic impact of a disaster.
- **Public Information Report (PIO)** - The Public Information report is designed to coordinate the release of information among key agencies and officials. Use of this report can help alleviate the problem of senior officials from different agencies releasing contradictory information during an emergency.

Tasks

Task Reports focus on the coordination of agencies attempting to plan and execute interagency response plans. This is a powerful tool for identifying objectives, assigning tasks in support of those objectives, and then monitoring the status of those tasks to ensure their timely completion.

- **Task Report** - This report is the foundation for the Task module. It allows managers to set overall objectives that need to be accomplished in response to an emergency.
- **Sub-Task Report** - This report is designed to assign tasks that support an overall objective detailed in a Task Status Report.
- **Action Request** - This report is designed to request a specific action in direct support of a Task or Sub-Task.
- **Action Plan Concern Report** - This report is used to identify shortcomings or unforeseen problems with a Task, Sub-Task, or Action Request.

Logs

- **Duty Logs** - The duty log is the catchall report of the system. It is designed to log everything of significance that occurred on your shift and any actions you undertook. You can also use the duty log to document anything that does not belong on another E Team report or reports.
- **Call Logs** - This feature enables you to determine who to call in which circumstances (e.g., a specific type of incident) and to record the results of your attempts to call.

Models

- **Hazard Model Reports** - Model Reports allow you to create Hazard Model reports to which models created outside E Team can be attached and subsequently viewed. Most users will not have access rights that allow them to add or delete these models, but they will have the capability to create the initial Hazard Model report to which the models are attached.

References

If you have the required access rights, you can create and update certain reference data in the E Team system.

- **Internet Links** - This feature allows you to enter and store URLs to websites of interest so that other E Team users can access them from within the system.
- **Site Reports** - This report allows you to create a list of fixed sites and their locations. Sites from this list can then be accessed in the location section of any report.
- **Reference Documents** - This feature allows you to store and retrieve documents such as contingency plans, situation-specific checklists, or any other stored document in electronic form.
- **Email Groups** - This feature allows you to create Email Groups. Groups from this list can then be accessed in the notification section of any report.
- **Personal Profile** – Although you always have access to you own Personal Profile document, when this feature is accessed via the create navigator it allows you to create Personal Profile documents for others. Profile documents make up the E Team Directory rolodex. This directory can be accessed throughout E Team in the notification, distribution, and responsibility sections and is also used when creating email groups.
- **Action Plan Template** - This option allows you to create templates that can serve as the basis for multiple Action Plans, saving you time so you don't have to re-enter the same information for each Action Plan. These templates can then be selected from within the Event, Incident, Medical Incident, and Activity reports.
- **Staffing** - Staff Scheduling allows you to create, store and modify schedules for your organization.
- **Organization Charts** – The Organization Builder enables you to build and display your organizational structure online, based on the structure of your organization and the skill sets of your personnel. Within this organization, you can create hierarchical levels, define the individual positions within each level, and include contact information and department or position checklists for each level or position.

Data Dictionary

Data Dictionary items are available only to administrative E Team users and are modifiable based on their level of access. The Data Dictionary is used to store the information contained in all of the picklists used to populate fields on the forms throughout the application. Most of the picklists available on the forms contain values that can be customized to meet the needs of your organization. In addition to configurable picklists, the Data Dictionary also includes user definable color codes, distribution groups and floor plans. Your system administrator defines these lists for everyone using the application.

🗁 **Administrative E Team users should refer to the *E Team Government Edition R2.2 System Administrator Guide* for full instructions on configuring your system's Data Dictionary.**

Launching E Team and Logging In

1. Turn on your computer.
2. Launch your Internet browser and type in the URL address assigned for E Team. Example: http://www.eteamdirect.com/government/demo/eteam.nsf.

Some computers may be configured so that E Team automatically appears when you log in to your Internet browser allowing you to skip step 2.

The E Team Welcome Screen display as shown in Figure 1.

Figure 1 – E Team Welcome Screen

3. Select ***OPERATIONS*** for real-life use. Select ***TRAINING*** for training and exercises.

The E Team Server Login Window displays as shown in Figure 2.

Figure 2 – E Team Server Login

4. Enter your Username and Password and click on the ***Login*** button.

Your Personal Profile document displays.

🗁 **Your Personal Profile will always display the very first time you use E Team. However, your system may be set up to restrict display of your Personal Profile on subsequent logins.**

🗁 **Required field labels are red. You must complete these fields to login. All other fields may be filled in at a later time by clicking on the Profile icon in the Tools Frame after login. For complete field-by-field help refer to Part 2 of this User Guide.**

5. Enter your First and Last Name.
6. Click on the ***Select*** button to choose your Organization or Location.

🗁 **When you click on *Select*, a new window opens providing you with a list of choices. If your choice is not on the list, enter it in the field labeled *Other* and click on the *Add* button. Only personnel with the proper administrative rights can add a new organization or agency to their profile.**

7. Click on the ***Select*** button to choose your Position.
8. Click on the ***Select*** button to choose your Agency.
9. Scroll through the document and add additional data in the appropriate fields.
10. Click on the ***Submit*** button to close and save your Personal Profile.

*The E Team Main Screen displays as shown in **Error! Reference source not found.**. Your system may be setup to display your Position Checklist at this time. In addition, if enabled, the system will display the log in window for RealTime Messaging (RTM).*

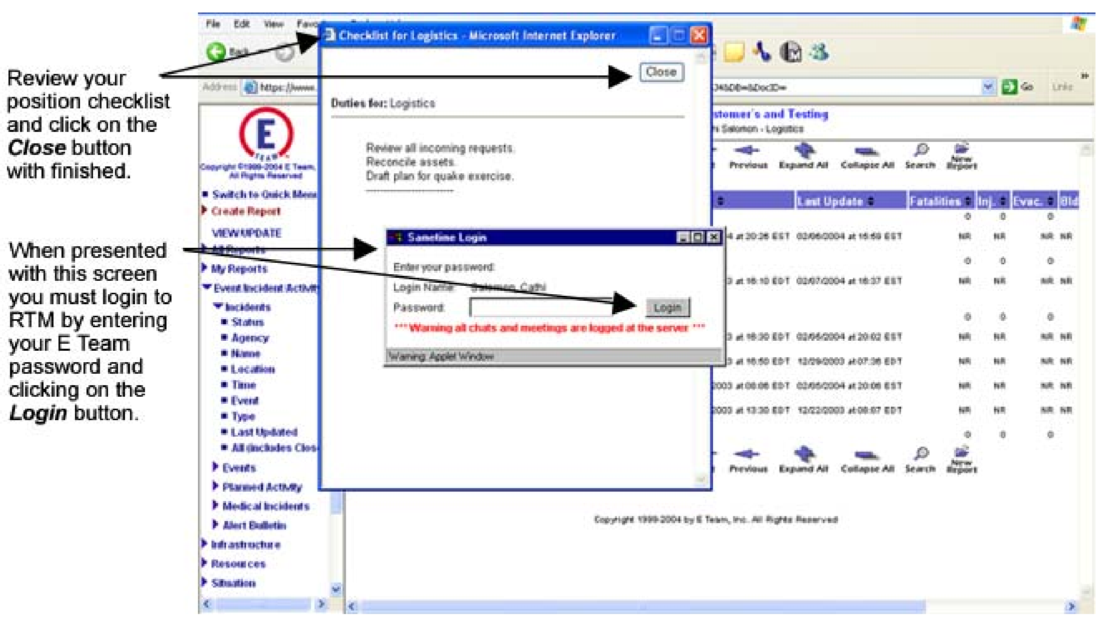

Figure 3 - E Team Main Screen at Login.

11. Review your Checklist and click the ***Close*** button at the top right of the document.
12. If your system includes the optional RealTime Messaging (RTM) feature you must log into RTM at this time by entering your password and clicking on ***OK***. Your RTM password is the same as your password for E Team login.

You are now ready to operate E Team.

Main Screen Layout

What You Need To Know

E Team provides a simple way to access information in the format in which you need it. The E Team main screen, as shown in Figure 4, is divided into three key sections:

- Top **Tools** Frame contains Help Tool icons that provide access to various E Team features and displays both your personal and system identification.
- Left **Navigation** Frame provides access to both the Full and Quick menus which contain the Create and View/Update navigation that provides access to reports.
- Center **View** Frame is where summary views and read-only versions of reports are displayed.

Both the navigation and view frames use collapsible/expandable twisties ▶. These twisties are used to identify items that can be expanded to display additional selections. Clicking on a twistie causes the selection to expand or collapse.

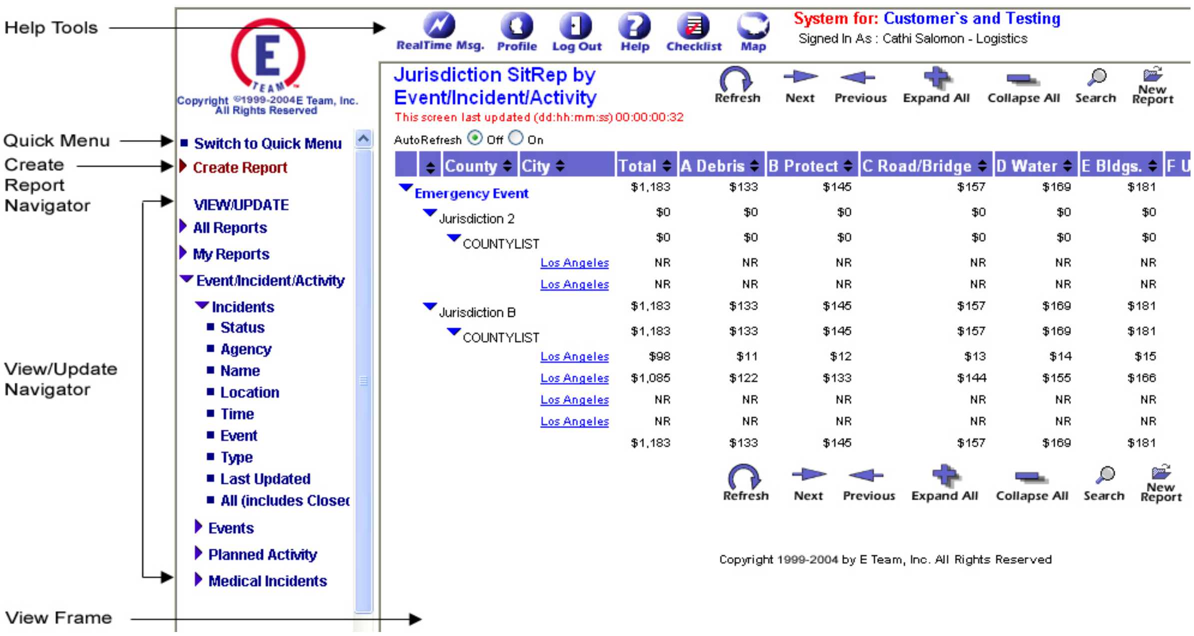

Figure 4 - E Team Main Screen Layout

Tools Frame

The Help Tools, as shown in Figure 5, allow you to access your Personal Profile and Position Checklist, RealTime Messaging, E Team Log Out, Online Help, and system Map.

Figure 5 - E Team Help Tools

- **RealTime Messaging** (optional feature) - Select *RealTime Messaging* to communicate in real time with other E Team users currently logged into the system. You can communicate in a group or privately with individuals.
- **Personal Profile** - Select *Profile* to review or edit your Personal Profile document.
- **Log Out** - Select *Log Out* to exit the E Team application. When you have completed working in the E Team application, it is recommended that you log out, particularly if you share a computer with another E Team user. DO NOT close the E Team application using the X in the upper right hand corner of your browser window. Closing the application in this manner will temporarily lock you out of the system.
- **Help** - Select *Help* to access E Team's comprehensive online help system.
- **Checklist** - Select *Checklist* to review a list of duties required by you during the course of your shift.

Map - Select *Map* to access your E Team map.

Navigation Frame

E Team provides your system administrator with the ability to customize both the E Team *Full Menu* and *Quick Menu* to best meet the needs of your organization and situation. Each of these menus contain both create and view/update selections. The menus, as shown in

Figure 6, will display only those reports and views available to you, based on your level of access. At login, your system will display the default menu and view as defined by your system administrator.

Figure 6 – E Team Navigation Frame

- **Menu Options** – Clicking on *Switch Quick Menu* or *Switch to Full Menu* will cause the other menu to collapse and the selected menu to display.
  - ✓ The Full Menu is displayed hierarchically.
  - ✓ The *Quick Menu* displays view selections in a list format.
  - ✓ In addition to views categorized by a single report type, views containing multiple report types are also available. When displayed hierarchically these are found under the heading *All Reports*.
  - ✓ When displayed hierarchically the *References* section of the menu also includes the view option for the
  - ✓ *E Team Directory* and a *History* option which when clicked opens your E Team History database in a new window.
- **Twisties** - Click on twisties to expand or collapse menu selections as necessary.
- **Create Reports** - Clicking on a report type within the red *Create Reports* navigator causes a new window to open containing a report form template that you fill in to generate a new report.
- **View/Update Reports** - The blue *View/Update Reports* navigator enables you to locate existing reports so that you can read and update them as necessary. Clicking on a selection causes the view to open in the *View Frame.*

🗁 **Refer to Appendix A for a complete list and definitions of all E Team views.**

View Frame

E Team reports are summarized in the View frame as shown in Figure 7. Views provide at-a-glance information and allow you to drill down quickly to reports of interest. Making a selection from within a view causes the selected report to open in read-only mode.

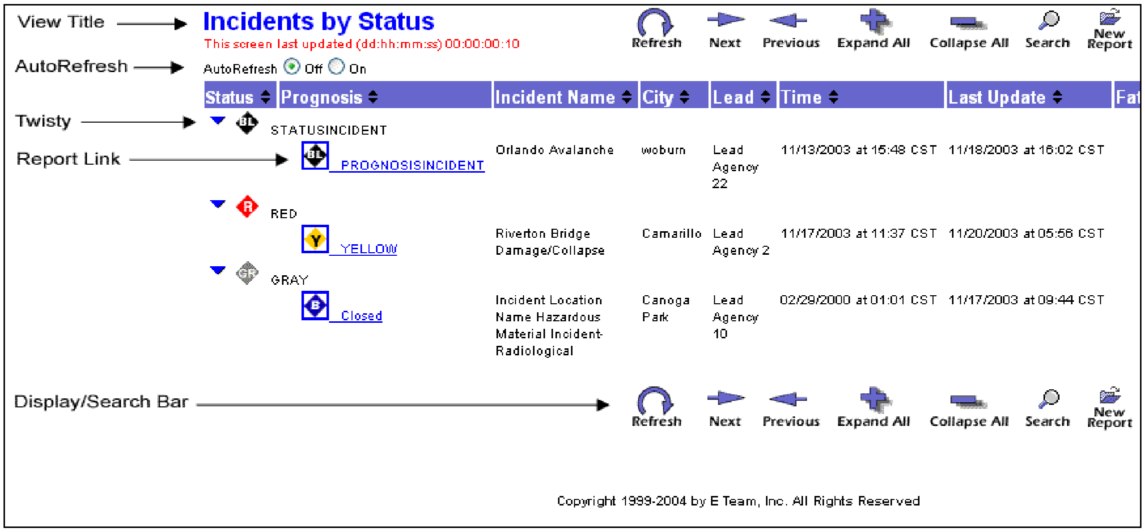

Figure 7 – E Team View Frame

- **Categorized Views** - Some summary views are presented as categorized lists. Category titles have a twistie to the left. Clicking on a twistie opens to the report summaries under that category.
- **Opening a Report** - To open an individual report, click the report link, which appears either as, an icon in a box or as underlined text.
- **View Tools** - There are several control tools that make it easier for you to find the information you want in E Team views.
  - ✓ **Display/Search Bar** - Click on the applicable icon to: make sure the data is current (Refresh), open or close all twisties (Expand All/Collapse All), page through the summary view (Previous/Next), search for a specific word or phrase (Search), or when available, open a new report of the type shown in the view (New Report).

Create New will only appear when a summary view containing a single report type is displayed. In views containing multiple report types you will be required to use the standard Create Reports links.

  - ✓ **AutoRefresh** – AutoRefresh displays as radio buttons at the upper left of your View window. When AutoRefresh is ***ON,*** the display on your screen will automatically update at preset intervals without your having to use the refresh tool on the *Display/Search Bar*.

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Working With Reports

What You Need To Know

- E Team reports are displayed in three distinct modes.
  - ✓ **Create Mode** – When you make a selection from the red *Create Reports* navigator, the selected report will open in a new window. In most cases, all fields in the new report will be completely blank until you enter data. In some instances, the system will prepopulate fields for you to save time. Part 2 of this document identifies these system-generated fields.
  - ✓ **Read Mode** – When you make a report selection from within the *View Frame,* the report opens and replaces the view being displayed in the frame. Although this mode is generally for viewing report contents and accessing a document to make updates, there are some actions such as adding attachments that can be done while in this mode. Read mode action items will be identified and explained throughout this document.
  - ✓ **Update Mode** – When you need to make changes to a report, clicking on the ***Update*** button of the report while in read mode will cause the report to open in a new window allowing you to add, change and save data as necessary.

🗁 **E Team is designed so that only one person at a time can access a report in Update mode. If you attempt to access a report that is in use by another E Team user, the system will display a message to let you know who is using the report. If you have the proper authorization, you will see a text link, *Take Over the Lock,* in this message window. Clicking this link releases the lock and in turn locks the original user out of the report, simultaneously causing a window to open on the original users' screen telling them that the document has been taken over by an administrator. Any changes you have made to the report WILL NOT be saved if you are locked out in this manner.**

- Unless otherwise noted, E Team reports consist of two frames. The top frame contains the report title and key form action buttons such as ***Submit*** and ***Cancel***. The bottom frame is scrollable and contains all data input fields.
- All reports created within the E Team application are saved in a separate *History* database. History lets you review every change that was made to each report.
- E Team reports contain many common features and functions. Learning how to use these will enable you to move throughout E Team with ease.

Report Buttons/Links

The following report buttons are found in *Create* and *Update* modes.

- **Submit Button** - When you have finished creating or updating a report, click the ***Submit*** button to save your changes.
- **Cancel Button** – To close a report or selection dialog window without saving changes, click the ***Cancel*** button.
- **Set Button** – All fields requiring date/time input contain a Set button. Clicking this button causes the Date Dialog window to open. Click ***Date*** and a calendar appears on which you set the date. For setting the time, click the arrow in the hour and minute window and select the correct numbers, then click the ***OK*** button. If you just click ***OK***, you get the present time. E Team uses a 24-hour military time clock and Pacific Standard Time (PST) as the default. Your system administrator can change the time zone.
- **Expand Button** – Expand buttons are used throughout E Team to allow you to read or enter large amounts of text in a small field. Clicking this button causes a new window to open that displays all existing data and allows you to add more.
- **Update Button** – Update buttons are used throughout E Team. Clicking this button causes a new window to open, providing a field in which to add data. Documents that are updated are automatically stamped by the system with the name of the individual performing the update, and the date and time of the update.

The following report buttons are found in *Read* mode.

- **Print Button** - Clicking this button causes a printable version of the report to open in a new window. To print, click the ***Send to Printer*** button in this new window.
- **Update Button** - If you are authorized to edit a report, you will see the Update button. Clicking this button will cause the report to open in a new window to allow for updating.
- **Delete Button** - Some E Team users are authorized to delete reports. For these users, a Delete button will be visible at the top of the report. Clicking this button causes the deletion process to begin. When complete, the report will only be available in the History file.
- **Duplicate Button** - This button is found on *Resource Requests* and *Critical Asset* reports. Clicking this button causes a duplicate of the document being viewed to open in a new window. The new document will retain some of the critical information found in the original request. This feature saves time by allowing you to modify the contents of a document and save it as new document.
- **Split Button** - This button is found on *Resource Requests* and *Critical Asset* reports. Clicking this button allows you to begin the process of splitting the document being viewed in order to have it acted upon by multiple agencies.

The following text link is found in the *Read* and *Update* modes.

- **View Attachments** – Displayed as a text link rather than a button, View Attachments is visible only if the report you are viewing has attachments. Clicking on this link will cause an automatic scroll down to the *Links and Attachments* section of the report.

Common Report Elements

Required Fields

Fields marked with an asterisk(*) and red label indicate that the field is required. You must enter data in these fields in order for the report to be accepted by the system. If you miss a required field, the system will prompt you to enter the required data.

Report Relationships

E Team provides you with the ability to relate all reports to an Event, Incident or Activity, as shown in Figure 8. This feature provides a way to capture the big picture and roll up related costs.

In general, your top level E Team report is an Event. Events can be comprised of multiple Incidents and/or Activities. Typically, all other system reports are generated based on the occurrence of an Event, Incident or Activity.

Key views within E Team are setup to capture Event detail. Therefore, it is important that you select relationship values at an Event level whenever possible. If you do not know the name of the Event, you can select the Incident or Activity instead.

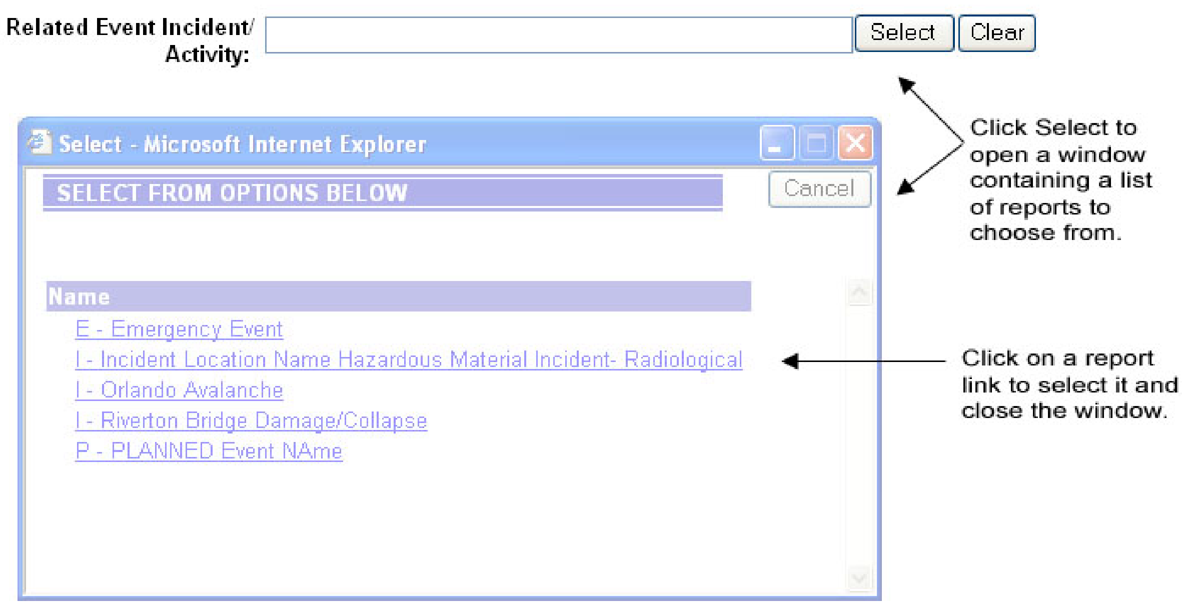

Figure 8 – E Team Relationship Field.

- Click on ***Select*** to open the relationship window.
- Make a single selection from the available list.

🗁 **Relationship of a report to a specific Event can also be preformed from within the Event report. While in the Event report users with the proper rights have the ability to relate or unrelate reports using the *Related Reports* field found on both the Emergency and Planned Event reports.**

Responsibility/Assignment Fields

E Team provides a way for you to assign responsibility for reports and tasks at varying levels, as shown in Figure 9. Selecting an individual to be responsible for a particular report or task causes the system to populate the *Agency, Organization/Location* and *Position* fields for you with data from that person's Personal Profile document. E Team users can then quickly locate their assignments in the *My Assignments* view accessed via the View/Update navigator.

Figure 9 – E Team Responsibility Fields

- Click on ***Select*** to assign the report to an individual listed in the E Team Directory.

🗁 **Assigning responsibility to an individual causes the system to generate data in the remaining Responsibility/Assignment fields.**

- If necessary, continue by clicking on the ***Select*** buttons in the *Organization/Location, Position,* and *Agency* fields to assign responsibility.

Date/Time

Any time you need to enter a date and time you will be using the Date Dialog windows, as shown in Figure 10. All fields requiring date/time input include a ***Set*** button. Clicking this button opens the initial Date Dialog window.

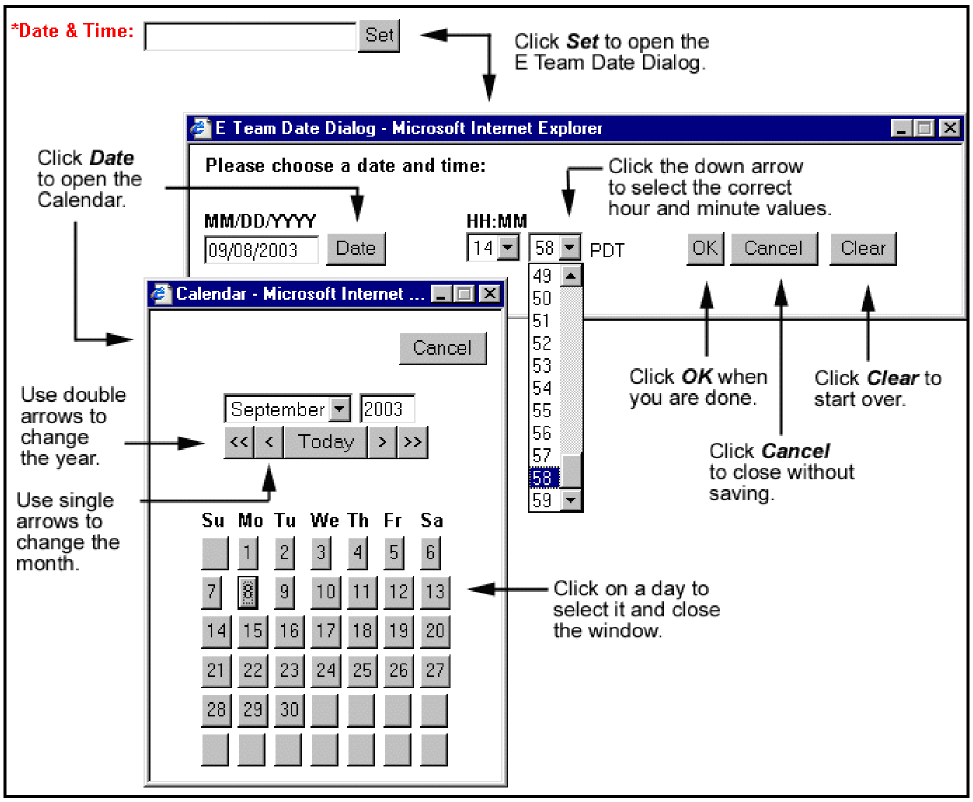

Figure 10 – E Team Date/Time

1. To select the current date and time click on ***OK***.
2. To change the date, click ***Date*** and a calendar window opens on which you set the date. Use the arrows to change the month and year. Click on ***Today*** to reset the calendar to today's date. Click on a day to select it and close the calendar.
3. To change the time, click the drop down arrow in the hour and minute fields and make your selections.
4. When you are done click ***OK***.

Picklists

The E Team application uses three types of picklists:

- **Drop down picklists**, as shown in Figure 11, have an arrow on the right of the input field. Click the arrow and the available list displays. Select the menu item you want, and it appears in the input field. The values contained in the drop down picklists can be customized by your system administrator to meet the needs of your organization.

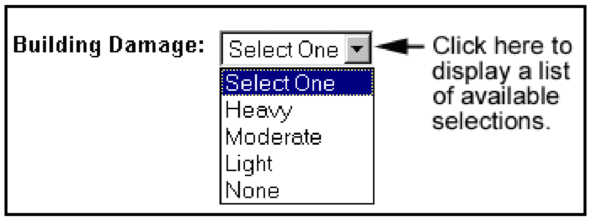

Figure 11 – E Team Drop Down Picklist

- **Multi-picklists**, as shown in Figure 12, have a ***Select*** button next to the field. Clicking on this button opens a window containing all available choices. You can select as many items as you wish. Your selection(s) will appear in the input field. The values contained in the multi-picklists can be customized by your system administrator to meet the needs of your organization.

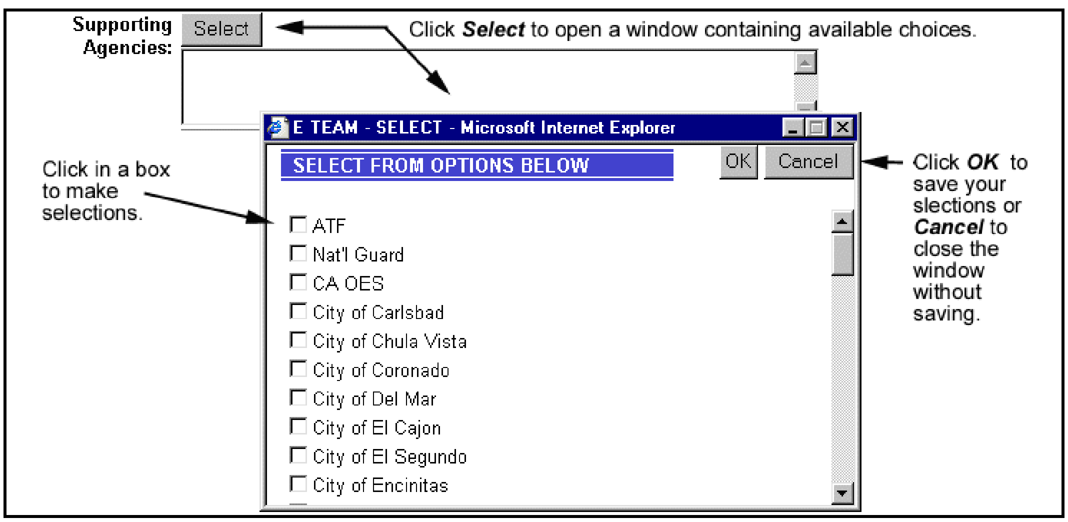

Figure 12 – E Team Multi-Select Picklist

- **Search/Add picklists**, as shown in Figure 13, are drop down picklists that include a ***Search/Add*** button next to the field. You can use the drop down picklist to make a selection or click on the ***Search/Add*** button to open a window allowing you to:
  - ✓ *Search* for an item by typing that item into the field. This causes the list to auto scroll down to the closest match. Use of this feature saves time when presented with long picklists.
  - ✓ Add a new item if the one you need is not on the list by typing into the *Other* field and clicking on the ***Add*** button. Adding an item in this fashion will not permanently add the item to the drop down list. If you need an item permanently added to the list, the drop down picklist can be customized by your system administrator to meet the needs of your organization.

🗁 **Once an item is selected or *Added,* this window will close and your selection will appear in the input field.**

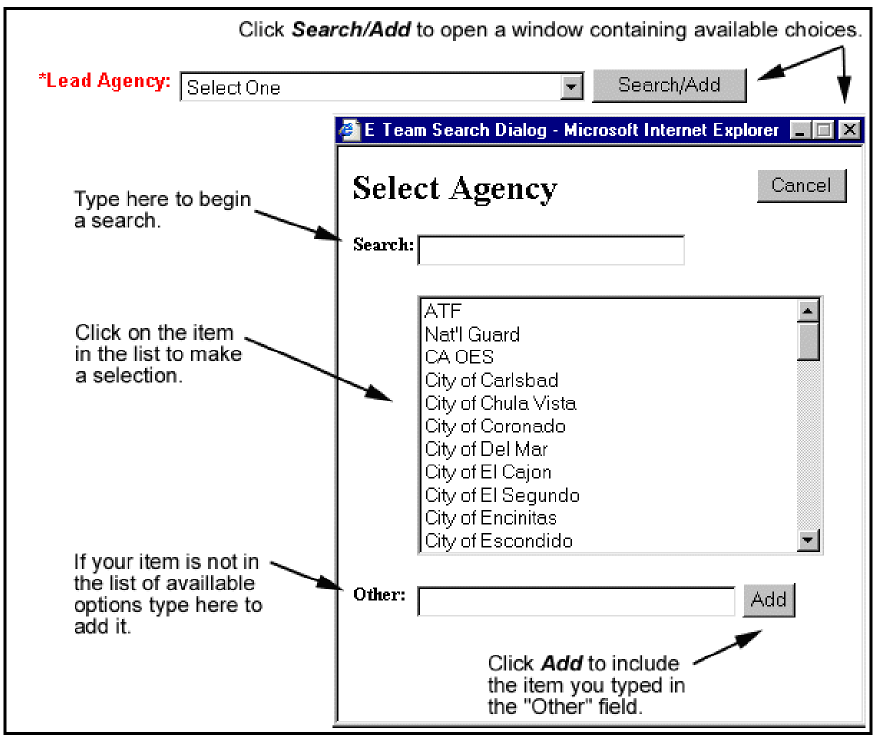

Figure 13 – E Team Search/Add Picklist

Location Fields

The Location section of the report, as shown in Figure 14, allows you to enter detailed location information so that your report can be displayed with an icon on the E Team map.

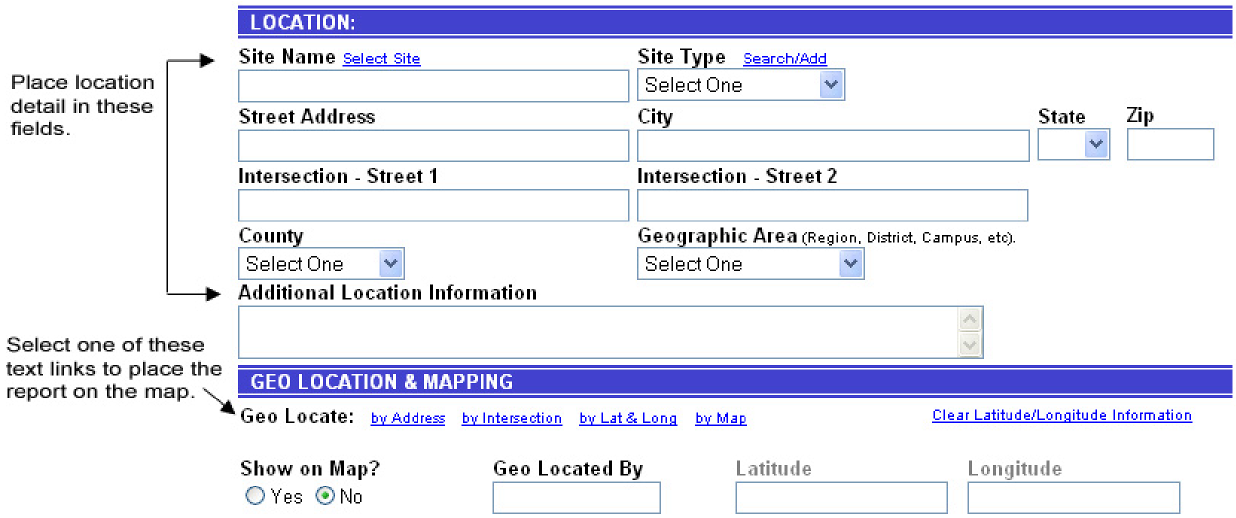

Figure 14 – E Team Location Fields

- Click on ***Select Site*** to open the *Site Selection* window containing a list of preloaded sites. If your site is not available in the list provided close the window.

> 🗁 **Selecting a site causes the system to populate the *Site Type, Address, City, State, Zip, Intersection, County, Geographic Area, Additional Location Data, Latitude, and Longitude* fields for you from data contained in the associated *Site Report.***
>
> 🗁 **Clicking on *Clear Site* causes all location data in the opened report to be cleared.**

- If you were unable to select a preloaded site or if data is missing, enter available information in the *Site Type, Address, City, State, Zip, and Intersection fields.*

> 🗁 **Adding information to a preloaded site in this fashion will not automatically enter it into its associated Site Report. If the updated site information replaces outdated information, it is recommended that you also update this information in the Site Report.**

- Once you have entered the location data, you have the option of *Geo Locating* (placing a report icon on the E Team map) in one of four ways:
  - ✓ select the ***by Address*** link,
  - ✓ select the ***by Intersection*** link,
  - ✓ select the ***by Lat & Long*** link,
  - ✓ select the ***by Map*** link.

> 🗁 **Refer to Geo Locating Reports, beginning on page 52, for complete details on how to geo locate using any of the four methods listed.**

- Next to ***Show on Map?*** there are two radio buttons that let you indicate whether you want this location displayed on the map. The default setting is NO. However, as soon as you geo locate, the system automatically changes this setting to YES. Alternatively, if you change the radio button to YES without geo locating, the system will prompt you to geo locate.

- Selecting the ***Clear Latitude/Longitude Information*** link causes the *Latitude* and *Longitude* fields to reset and removes the report icon from the map.

Distribution Fields

The Distribution section of the report, as shown in Figure 15, is used to define who can view the report. **Fill in this section ONLY IF YOU WISH TO RESTRICT ACCESS** to the report from the general population of E Team users. If you leave the fields empty, the report will be accessible by all E Team users.

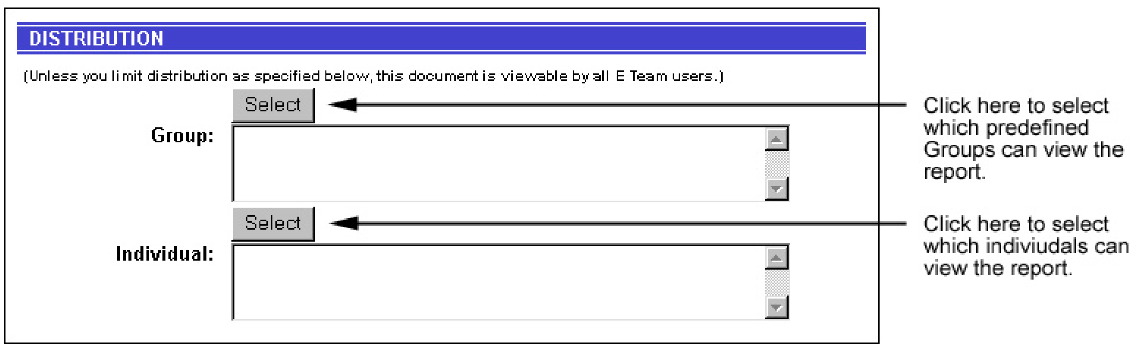

Figure 15 – E Team Distribution Fields

- Select all Groups that SHOULD HAVE access to the report. Once Groups have been selected, the general population of E Team users will no longer be able to view this report.

🗁 **Distribution Groups are created by your system administrator.**

🗁 **Your system administrator may have elected to establish a default distribution setting for your organization. When this occurs the default group data will appear in this field on all reports.**

- Select all individuals that SHOULD HAVE access to the report. Once individuals have been selected, the general population of E Team users will no longer be able to view this report.

Notification Fields

You can use the Notification section, as shown in Figure 16, to notify both E Team users and non-users about a report within the system. This section provides fields for you to select individuals from the E Team Directory and/or from a convenient list of predefined mail groups, as well as enter email addresses for those not appearing in either list.

Notifications are sent as email or email pager alerts. E Team users select their *Preferred Method of Notification* when they complete or update their Personal Profile document.

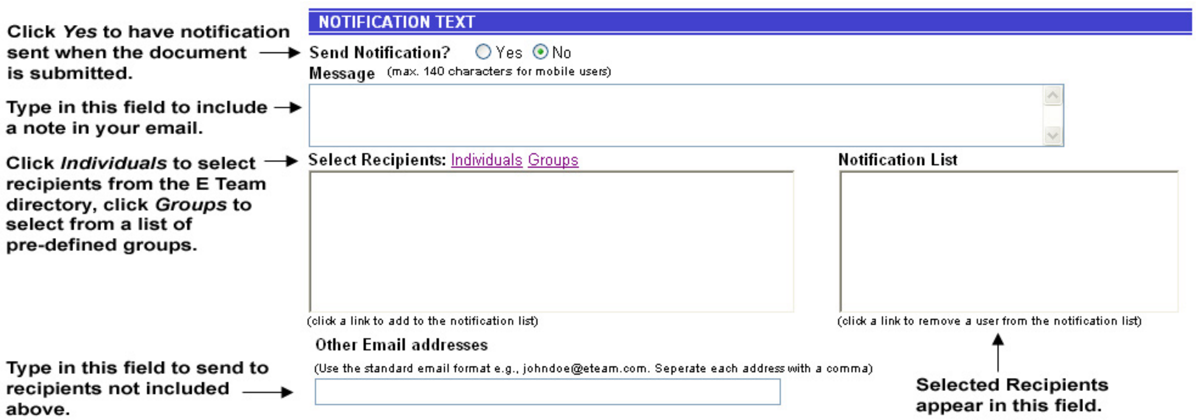

Figure 16 – E Team Notification Fields

1. Click on ***Yes*** if you want to send an email notification.

🗁 **The email will be sent when you click on the *Submit* button of the report you are working on.**

2. Type in the *Message* field to include a text message that will appear in the message being sent.

🗁 **It is important to remember that those receiving notification by means other than standard email will only see the first approximate 110 characters of your message.**

🗁 **A document link will be included in notification received by E Team users who have selected email as their *Preferred Method of Notification* on their Personal Profile. When the link is clicked, the E Team login window will display and the user will be required to log into E Team prior to viewing the report. Once logged into the system, the associated report will be displayed in the View frame.**

3. Click on the ***Individuals*** text link.

A list of all individuals contained in the E Team directory is displayed in the Select Recipient's box.

4. Click on a name to add it to the *Notification List*.

The selected name is removed from the selection list and placed in the Notification List field to the right.

5. Click on the ***Groups*** text link and repeat steps 4 and 5 above to select from a list of pre-defined groups.

🗁 **To view group members, use the View/Update navigator to select References > Email. Then from the View Frame select the appropriate Group Name.**

6. Enter email addresses in the *Other Email Addresses* field to notify individuals not appearing in the lists supplied.

🗁 **To remove a recipient from the Notification List click on the underlined text link.**

Attachments

File Attachments

You can attach a file to any E Team report using the Attachments section as shown in Figure 17. Attachments can be added ONLY in the read-only mode of the report.

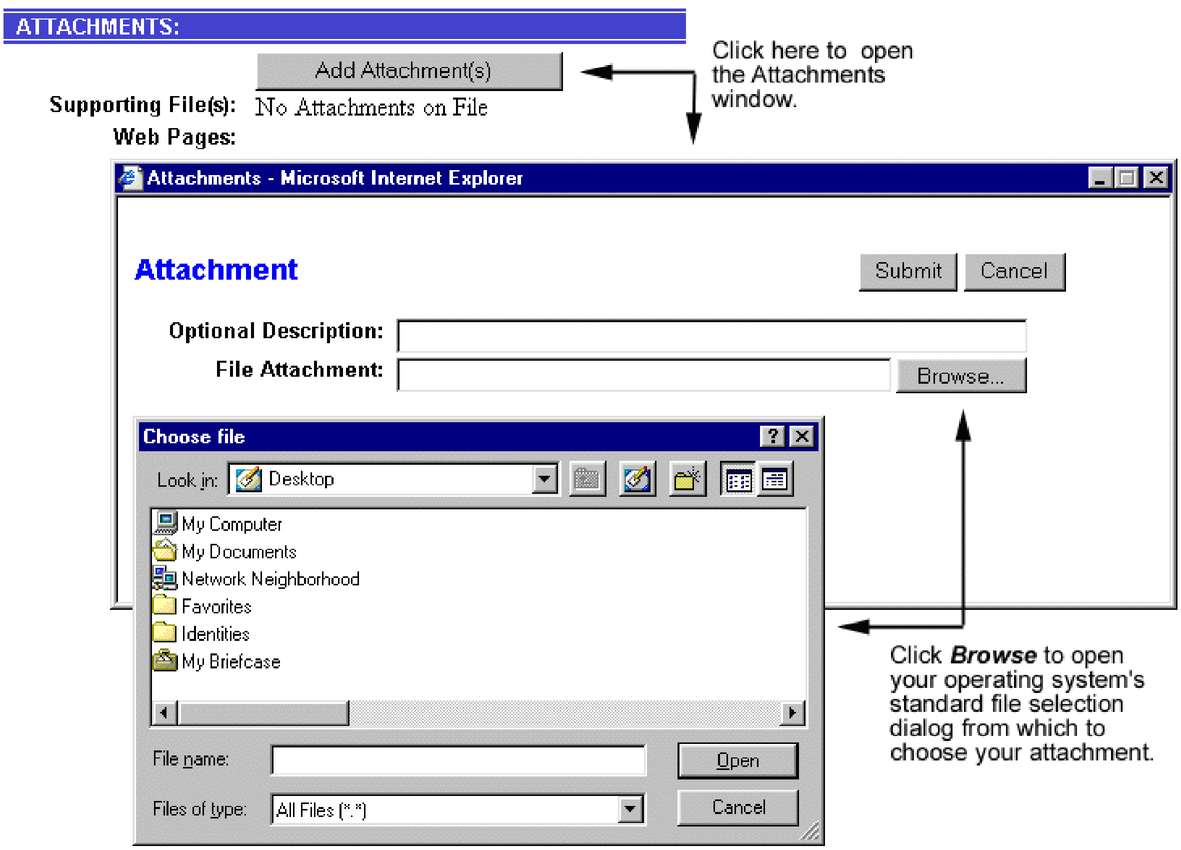

Figure 17 – E Team File Attachments

1. Click on the ***Add Attachment(s)*** button to open the E Team Attachments window.
2. Click on the ***Browse*** button to open your system's standard file selection window and make your selection.

   The file selection window closes and the selected file name is displayed in the File Attachment field.

3. If you wish, you may enter an *Optional Description* for the file selected. This description will appear instead of the actual file name when viewing the attachment list for the report.

🗁 **If you do not enter an *Optional Description* the actual file name will display in E Team.**

4. Click ***Submit*** to close the Attachments window.

   The attached file description/name is displayed with an active document link.

WEB PAGE ATTACHMENTS

You can attach a web page reference to any E Team report using the Attachments section as shown in Figure 18. Web page references can be added and deleted ONLY from the create and update modes of the report.

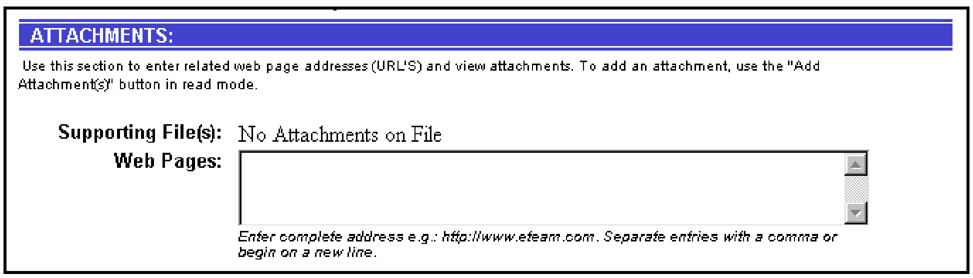

Figure 18 – E Team Web Attachments

- Enter the URL for all web pages. Separate each entry with a comma or line break. The data will be saved when you submit the report.

🗁 **You must enter the complete URL of each website or page to ensure a link will be created for the entry. Example: http://www.eteam.com/service.htm**

🗁 **Web page attachments can be viewed by clicking on the web page text link in the read-only mode of the report.**

VIEWING AND DELETING ATTACHMENTS

You can view or delete an attached file from the read or update mode of the report as shown in Figure 19. When attachment(s) have been added to a report, you will see the ***View Attachments*** text link at the top of the report in both read and update modes.

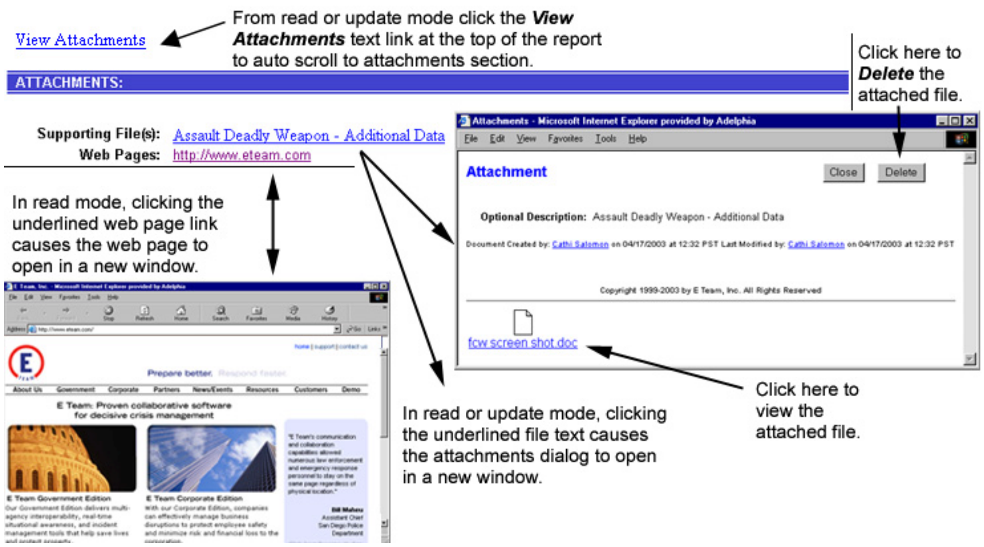

Figure 19 – E Team View/Delete Attachments

- Click on the ***View Attachments*** text link to auto scroll to that section of the document.
- To view or delete an attached file, click on the underlined text link to open the *Attachment Dialog*.
- Click on the ***underlined file link*** to open an attachment.
- Click on ***Delete*** to remove the file attachment from this report.

🗁 **The deleted file will no longer be listed as an attachment to this report, although it will remain accessible in History.**

Data Sharing

What You Need To Know

E Team enables you to share documents with users on other E Team systems using the fields shown in Figure 20. It is the responsibility of your E Team system administrator to configure your system to enable
E Team-to-E Team Data Sharing.

- If your system is E Team-to-E Team capable, and your E Team administrator has given you access rights, you will see the full Data Sharing section as part of your report.
- If you do not have data sharing rights, you will see only a *Comments* field within the Data Sharing section. You are not expected to make an entry in this field.
- When you share a report with another E Team system(s), you retain ownership of the report and can modify the report as you choose. Systems with which you have shared the report have read-only access to the report.
- The *Assign Control To* option allows you to assign edit/update rights to another E Team system. **WHEN YOU ASSIGN EDIT/UPDATE RIGHTS TO THAT SYSTEM, YOU GIVE UP YOUR OWN EDIT/UPDATE RIGHTS.** The only way to reclaim those rights is for that system to assign control back to you.
- When you assign control of a report to another E Team system, you can also choose whether to allow that system to forward the report to yet another E Team system. If you select ***No***, the system with which you are sharing the report will be unable to forward the report and will only have the option of returning the report to you.

Data Sharing Fields

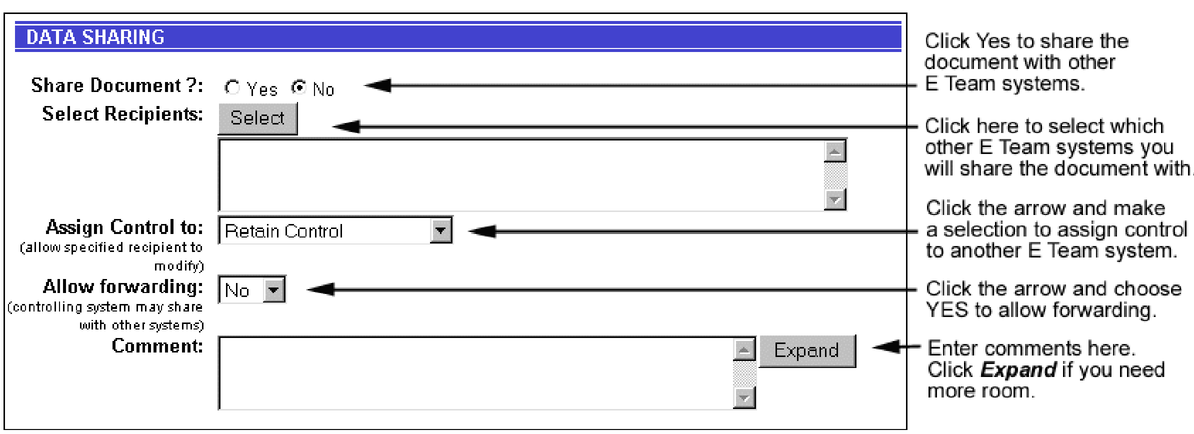

Figure 20 – E Team Data Sharing Section

1. Click on the ***Yes*** option, as shown in Figure 20, to allow the report to be shared.
2. Click the ***Select*** button to choose your data sharing partner(s). The report will be available to the E Team system(s) you have selected only after you submit it.

3. Click the arrow to *Assign Control To* another E Team System if you wish to assign edit/update rights to that system.

🗁 **Assigning control to another E Team system allows them to edit/update that report. You will have read-only access to the report until such time as the other E Team system you assigned control to, assigns control back to you.**

🗁 **If you have chosen to assign control to another E Team system, you also have the option to allow them to *Forward* the report to another system that they share data with.**

4. Click the arrow and select ***YES*** to Allow Forwarding.

🗁 **If you select *No*, the system with which you are sharing the report will be unable to forward the report and will only have the option of returning the report to you.**

RealTime Messaging

RealTime Messaging (RTM) is an optional feature. RTM allows you to communicate in real time with other E Team users concurrently logged into the system. You can communicate in a group or privately with individuals. If your E Team system is equipped with RTM you will:

- have been presented with the RTM login window after E Team system logon,
- have the RTM icon visible first among the Help Tools displayed in the Tools frame at the top of your main screen.

What You Need To Know

- General messages sent to all logged in users will only appear to those who have their Real Time Messaging window open.

> 🗁 **It is recommended that you use the E Team Alert Bulletin feature to send announcements to all logged in users.**

- Invitations to a meeting or private message will pop-up automatically on the screen of all users to whom they have been sent.
- The popping-up of these messages will not interfere with normal system operation.
- You can join in a general chat session at anytime, you must be invited to join a private chat or meeting.
- Text that you have sent will always appear in blue on screen.
- You can close the chat window by clicking the ***Close*** button at anytime.

> 🗁 **Closing the chat window DOES NOT log you out of RTM. RTM logout occurs when you log out of E Team.**

- Each chat session will be saved and can be viewed via the View/Update navigator by selecting *References* > *Chat Logs*.

Launching RealTime Messaging

1. Click on the RealTime Messaging icon in the Tools frame to access RTM.

   The RealTime Message window is displayed as shown in Figure 21.

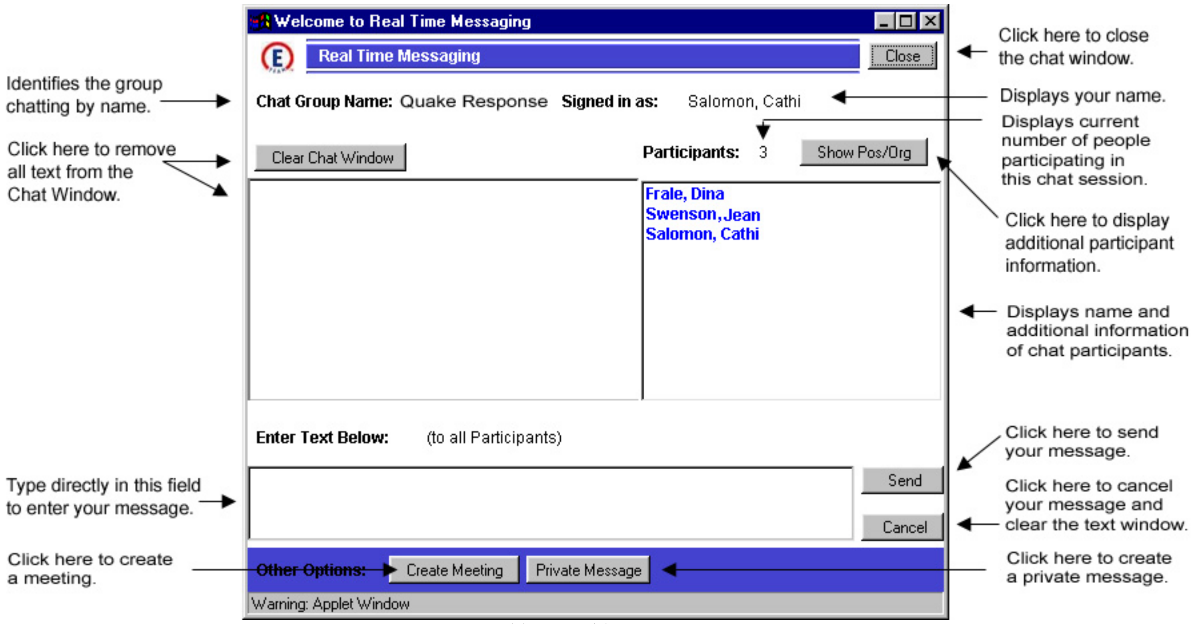

Figure 21 – E Team RealTime Messaging Window

Sending a Message to All Logged In Users

1. Type in your text message
2. Click on ***Send***.

   The message, as shown in Figure 22, is displayed to all logged in E Team users who have their RealTime Messaging window open.

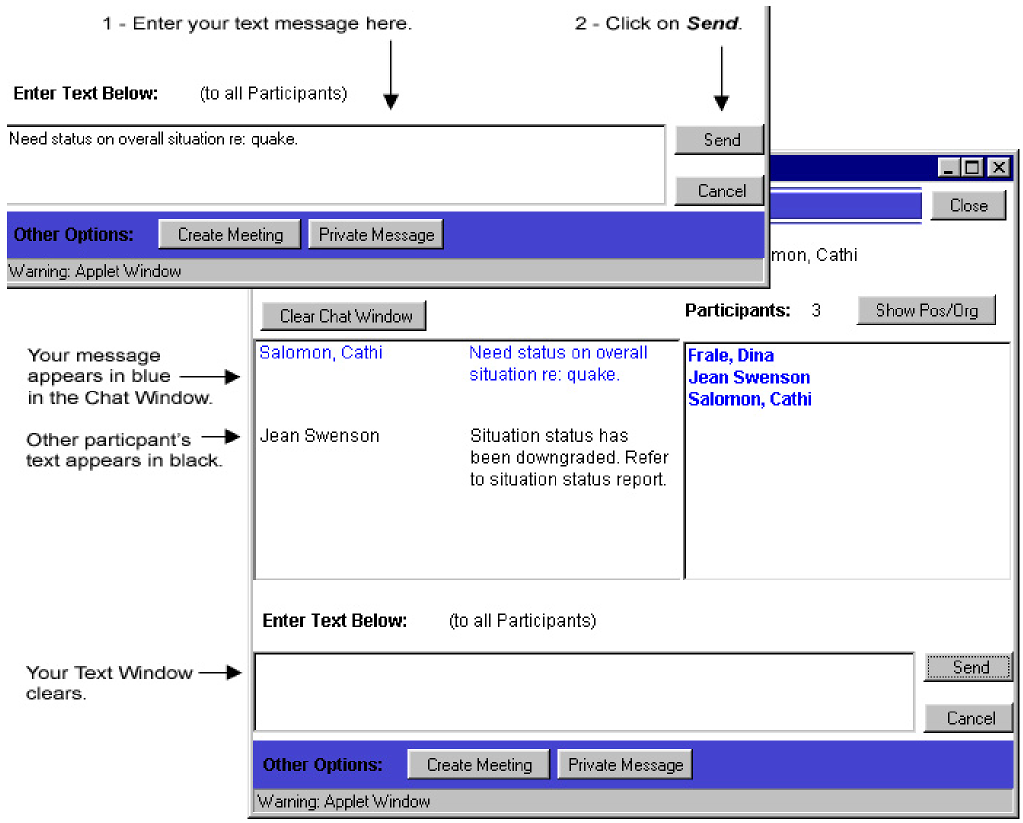

Figure 22 – E Team RTM Message

3. Continue adding or responding to the message as required, clicking on ***Send*** each time.
4. When the session is over click ***Close***.

Sending a Private Message

1. Click on the ***Private Message*** button at the bottom of the RealTime Messaging window.

   The Private Message screen is displayed as shown in Figure 23.

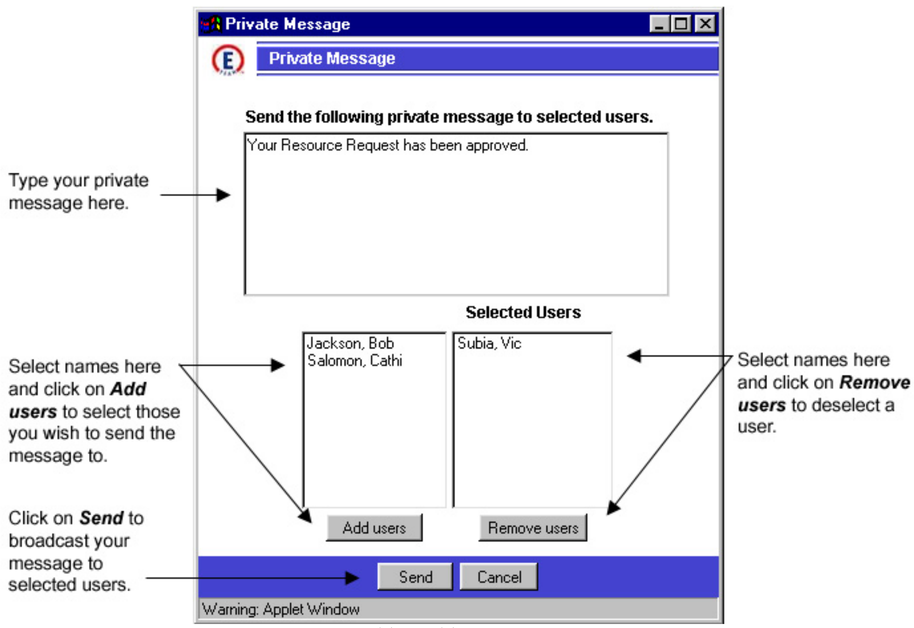

Figure 23 – E Team RTM Private Message Screen

2. Add/Remove *Selected Users* by highlighting the name and clicking on the ***Add users*** or ***Remove users*** button(s) as appropriate.

3. Type in your text message and then click on ***Send***.

   Your Private Message window closes and the message is displayed to selected users only, as shown in Figure 24.

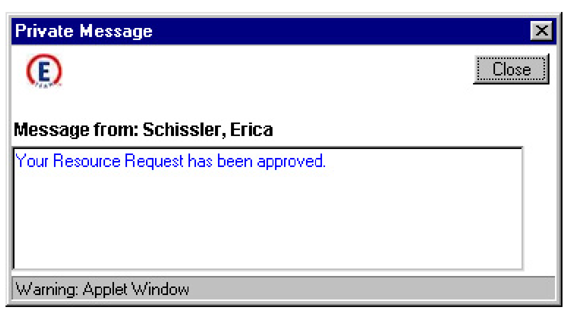

Figure 24 - E Team RTM Private Message Broadcast

🗁 **The Private Message feature is a ONE WAY broadcast to selected users only. To chat with selected users you should use the RTM Meeting feature.**

Creating a Meeting

1. Click on the *Create Meeting* button at the bottom of the RealTime messaging window.

   The Create Meeting window is displayed as shown in Figure 25.

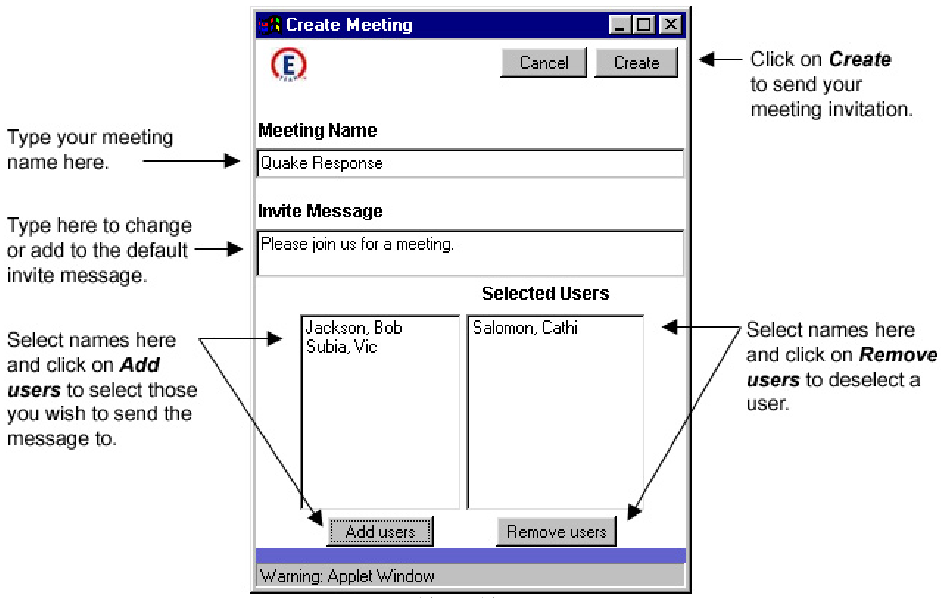

Figure 25 – E Team RTM Create Meeting

2. Enter a Meeting Name.
3. Enter an Invite Message.
4. Select which participant(s) are to be included in the meeting.
5. Click on the **Create** button.

   Your meeting invitation is broadcast to selected users, as shown in Figure 26

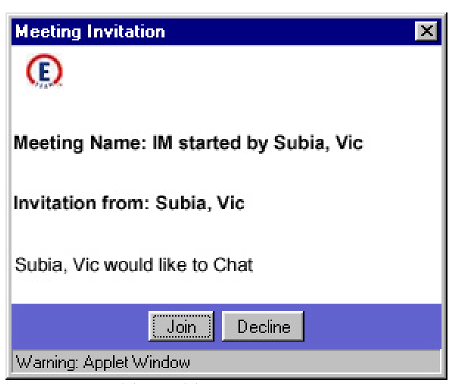

Figure 26 – E Team RTM Meeting Invitation Broadcast

When you receive a meeting invitation click on *Join* to open the meeting window. Clicking on *Decline* closes the invitation window.

At the same time your invitation is being broadcast, your invitation window closes and the meeting chat window opens on your screen, as shown in Figure 27.

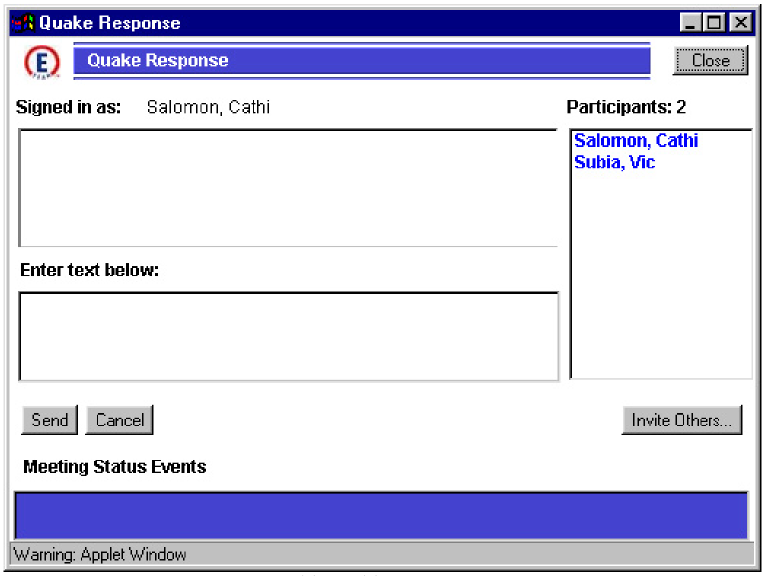

Figure 27 – E Team RTM Meeting Chat Window

As invited participants arrive, their names will appear in the Participants list.

6. When participants have arrived, begin the meeting by typing in your message and clicking on ***Send***.

   The message is displayed to meeting participants.

7. Continue adding or responding to the meeting as required, clicking on ***Send*** each time.

You can invite others to join the meeting even after it has started by using the *Invite Others* button.

8. Click on the ***Invite Others*** button.

   The Invite Others window is displayed, as shown Figure 28, your meeting chat window remains open.

Figure 28 – E Team RTM Invite Others Window

9. Highlight names of users you wish to invite to the ongoing meeting and click ***Add users***.
10. When you have finished adding names, click ***Invite***.

    The Invite Others window closes and the invitation is broadcast to the selected users.

As new users join the meeting, their names will appear in the meeting chat window.

11. When the meeting is over click ***Close***.

Viewing Maps

Many E Team reports contain a location section used to geo locate that report on a map. Maps provide a graphic summary of the reports in E Team. Once you have successfully geo located a report on the E Team map, the report location can be viewed by others and the report can be accessed directly from the map.

To access the map view, click on the Map icon in the Tools Frame of the main E Team window. Clicking this icon causes the E Team *Map Viewer* window to open. Each time you access the map by clicking on the Map icon you will have to select which report and overlays you wish to have display.

> **Users who choose to keep the map viewer open in a separate window, must remember to refresh the map each time it is viewed in order to ensure that all reports added since the last viewing are displayed.**

What You Need To Know

- The default map and extent (level of zoom) are set by your E Team System Administrator.
- The *Available Maps* picklist contains all available maps configured for your E Team system.
- The *Icon* selection window allows you to customize your map view by selecting only those report type icons you wish to display. A check mark indicates that the report type will display on your map. Unchecking the box will remove those report type icons from your map display. Use the scroll bars to view all available report types.
- The *Layers* selection window allows you to customize your map view by selecting the level of detail to be displayed including or excluding predefined layers, (e.g., states, streets, rivers, etc.). A check mark indicates that the detail will display on your map. Unchecking the box will remove those layers from your map display. Use the scroll bars to view all available map layers.
- The *Overlays* selection window allows you to view a list of all the overlays that have been created within the E Team system. Placing a check mark in the box next to the overlay will cause it to display on the map. The Overlay selection frame only displays if there is at least one overlay within the system and only if you have access rights to view the document associated to the overlay.
- The *Refresh Map* button is used to redraw the map and MUST be selected after you have made any changes in the Available Maps picklist or changed the settings in the Icons or Layers checkboxes.
- Each time you click on the ***Refresh Map*** button, the system draws the new map at the current level of zoom (also referred to as extent). For example, if you are zoomed in to street level, then you change the map, the new map will display at street level. If you want to see the default view for this map, you must click the Initial View tool, shown in Figure 30.
- In order to see more of your map, you can take advantage of the full screen available on your monitor by clicking on the maximize button at the upper right corner of the map and then clicking on Refresh Map to redraw to the new window size.

- An icon image is used to identify reports that have been geo located on the map. These icons typically depict the type of report. For example, when ***Incidents*** are selected in your map view, an airplane icon would represent an airplane related incident.

🗁 **Refer to Appendix B for a complete list of all mapping icons used in this application.**

- The color of the icon indicates the status of the related document as defined by your System Administrator. There are nine (9) status colors available within E Team. Your system may use all or a subset of these colors for each report type. Colors are setup in order of worse to best case as follows:
  - ✓ Black
  - ✓ Purple
  - ✓ Red
  - ✓ Orange
  - ✓ Yellow
  - ✓ Green
  - ✓ Teal
  - ✓ Gray
  - ✓ Blue
- You can access a report from within the map view by using the *Select Tool*.
- You can quickly drill down to a report location on the map by clicking on the icon.

Defining Your Map View

1. Click on the Map icon in the Tools Frame.

   The Map Viewer window displays.

🗁 **The first time you access the Map Viewer the window will display the default map and extent as set by your System Administrator. All Map Layers will be checked indicating that they are ON. Anytime you redefine your map view you must click on the *Refresh Map* button to see your changes take effect. Your map will be redrawn at the current extent.**

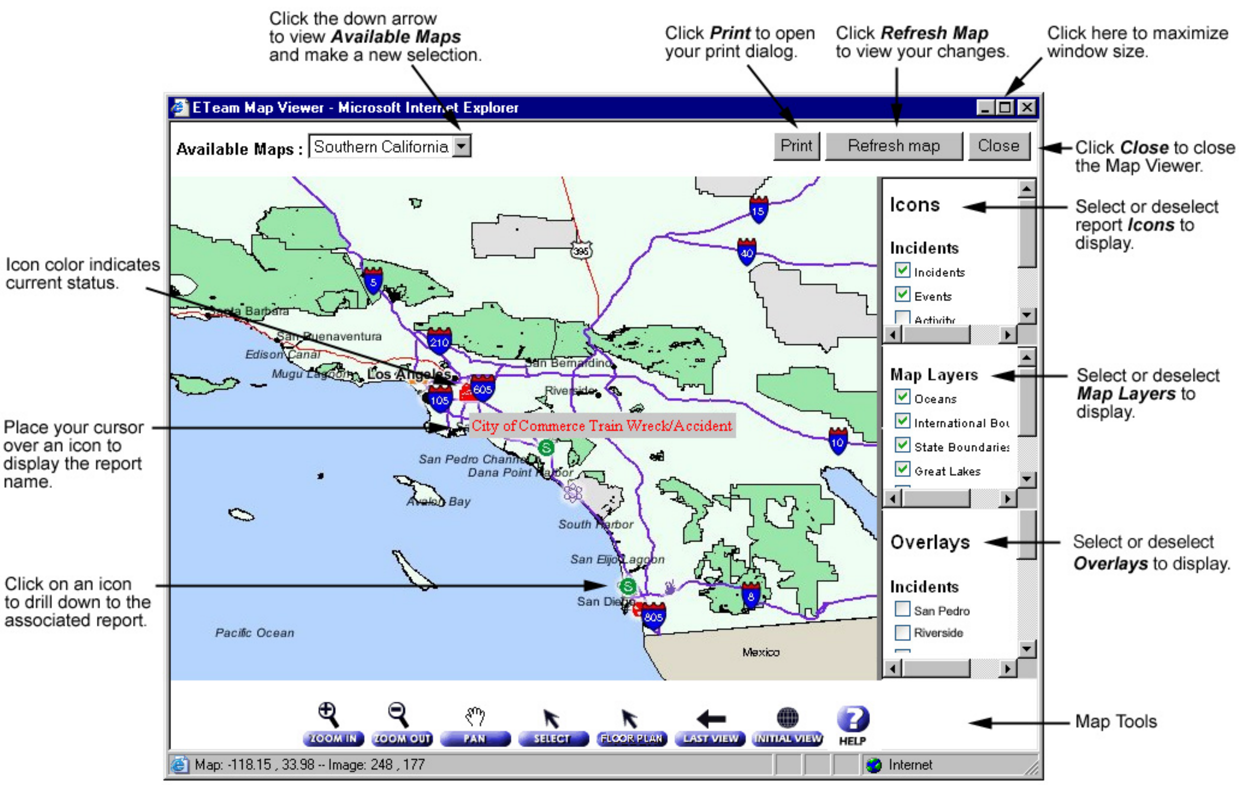

Figure 29 – E Team Map Viewer Window

- To change the map, make a selection from the *Available Maps* drop down picklist.
- To select the various types of reports you wish to have displayed on your map, check or uncheck applicable boxes in the *Icons* section.
- To change the map layers you wish to have displayed on your map, check or uncheck the applicable boxes in the *Map Layers* section.
- To see your changes take affect, click on ***Refresh Map.***

🗁 **When you change maps, the system draws the new map at the current level of zoom (also referred to as extent). For example, if you are zoomed in to street level, then you change the map, the new map will display at street level. If you want to see the default view for this map, you must click the Initial View tool, shown in Figure 30.**

Using The Map Tool Bar

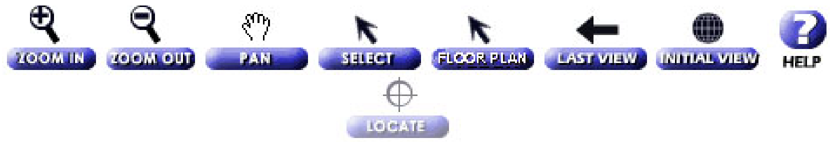

Figure 30 – E Team Map Tool Bar

- **Zoom In** - To zoom in, click on the *Zoom In* magnifying glass with the plus sign; then go to the upper right or lower left corner of the area on which you wish to zoom in. Depress and hold down the left mouse button and drag the cursor to the corner diagonally opposite your area of interest. Dragging the cursor will cause a red box to appear. When you release the mouse button, the map will zoom in to include just the area of interest as defined by the red box you drew.
- **Zoom Out** - To zoom out, select the *Zoom Out* magnifying glass with the minus sign, then click until the map view you want is displayed. The location of the cursor on the map will become the new center of the zoomed out map.
- **Pan** - To pan (move the image to the right, left, up, or down), select the *Pan* hand icon. Next, move your cursor onto the map, depress and hold the left mouse button, and drag the cursor. Release the button when you have the desired view.
- **Select -** To view the report represented by one of the icons on the map, click on the *Select* arrow, then click on the icon on the map. The report associated to that icon will appear. To return to the map, click the Map Box icon in the Windows task bar at the bottom of your screen.
  - ✓ **Locate** - If you launch the map in the process of geo locating from the Location section within a report, a C*ross-hairs* icon, as shown in Figure 29, will replace the *Select* arrow. Click the cross-hairs icon and then click on the map location you wish to select.
- **Floor Plan** – The Floor Plan tool displays if you have the optional Floor Plan capability installed. This tool allows you to select and display floor plans associated with your buildings. Click on the Floor Plan icon, then click on the building whose floor plans you wish to display. A dialog box will open, displaying a list of the floor plans available for viewing for that specific building, as determined by your System Administrator. Select the floor plan that you wish to view. Click *Close* when you have finished viewing.
- **Last View** - Each time you use a map tool (e.g., pan, zoom in, or zoom out) or click on the *Refresh Map* button to change the map display, the system updates the map view. For example, when you pan from one area on a map to another, the map view is updated to display the new area. When you click Last View, the display updates one step back to the prior map view.

- **Initial View** - This is the default map view that displays the first time you select a map from a view navigator or from the Available Maps picklist. Each time you use a map tool (e.g., pan, zoom in, or zoom out) or click on the Refresh Map button to change the map display, the system updates the map view. When you click on the *Initial View* button, the map display reverts to the default view. You can click on *Initial View* at any time while you are using the map if you wish to return to this default view.
- **Help** – Click to this button to launch E Team's comprehensive online Help.

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Geo Locating Reports

When you create reports in E Team, you enter information that enables the system to generate icons to represent these reports. You can then choose to display these icons on the E Team map by geo locating the report using the Location section fields within the report.

What You Need To Know

- Reports are geo located on the map using the fields contained within the E Team Location section of the report form.
- Before you can geo locate your report must be open in the *Create* or *Update* mode.
- There are four distinct ways to geo locate a report on the map, each requiring you to enter data in various fields within the Location section.
  - ✓ Geo Locate by Address
  - ✓ Geo Locate by Intersection
  - ✓ Geo Locate by Map
  - ✓ Geo Locate by Latitude and Longitude
- Selecting a predefined site in the *Select Site* field causes the system to fill in all available address data as defined on the associated Site report.
- The *Display on Map* radio button MUST be checked to ***YES*** and one of the geo location methods performed in order for the report to be seen on the map.

Reports that have been closed WILL NOT display on the map.

Geo locate by Address or Intersection

1. Click on the ***by Address*** or ***by Intersection*** text link as appropriate.

   The Location dialog is displayed as shown in Figure 31.

Figure 31 – E Team Geo Location Dialog

2. If the information is correct, click on ***Accept*** which will close the window and geo locate the report on the map.
3. If you wish to see the selected location on the map, click ***Show on Map***.

   The Map Viewer window, as shown in Figure 32, is displayed with an X indicating your report position.

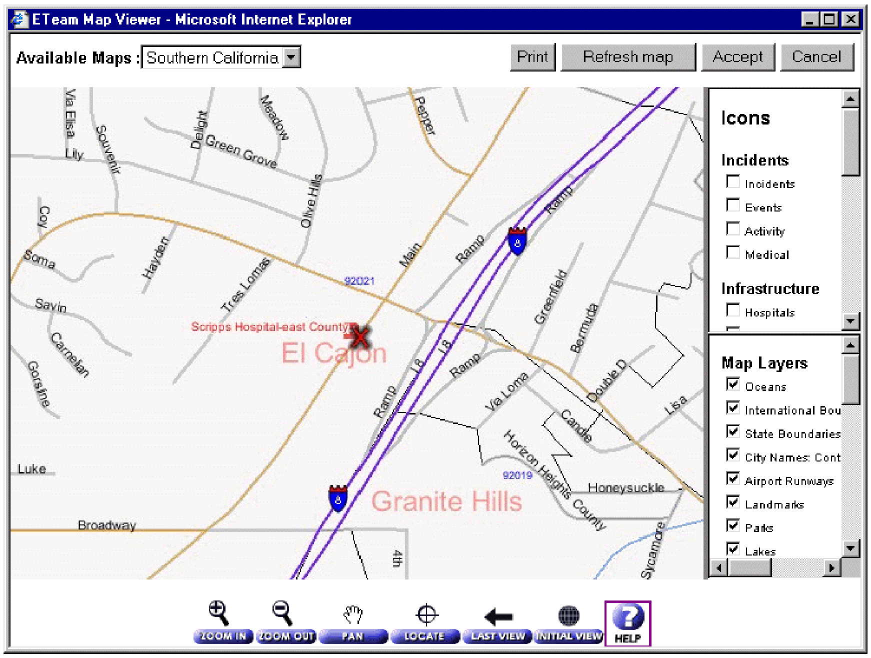

Figure 32 – E Team Map Viewer (Show On Map)

4. To accept the location, click ***Accept*** which will close the window and geo locate the report on the map.

🗁 **Once the system locates the report on the map, the X changes to the icon type and status color defined within the report.**

5. If you want to change the location position, click on the ***Locate*** tool at the bottom of the window, then click the spot on the map where you would like to mark a new location position.

   The window refreshes and the X is now displayed in the new location.

6. When you are satisfied with the location position on the map, click ***Accept*** which will close the window and geo locate the report on the map.

Geo locate by Map

1. Click on the ***Map*** button.

   The Map Viewer window is displayed as shown in Figure 33.

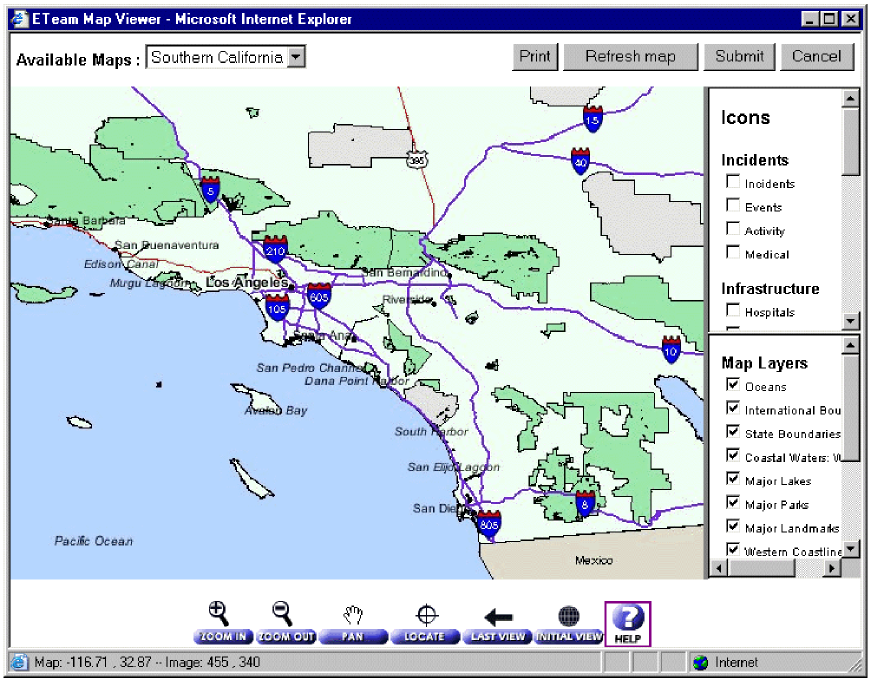

Figure 33 – E Team Map Viewer (Locate By Map)

2. Adjust your map view as necessary (e.g., zoom in, zoom out, pan, etc.).

🗁 **Remember to click on *Refresh Map* if you change Available Maps, Icons, Layers or Overlays.**

3. Click on the ***Locate*** tool at the bottom of the window, then click the spot on the map where you would like to place the report icon.

   The window refreshes and the X is now displayed in the marked location.

4. When you are satisfied with the location position on the map, click ***Submit*** which will close the window and geo locate the report on the map.

Geo locate by Latitude and Longitude

If you know the latitude and longitude of the location you wish to mark on the map, you can use this information to geo locate the location.

1. Click on the ***by Lat/Long*** text link.

   The Lat/Long window is displayed as shown in Figure 34.

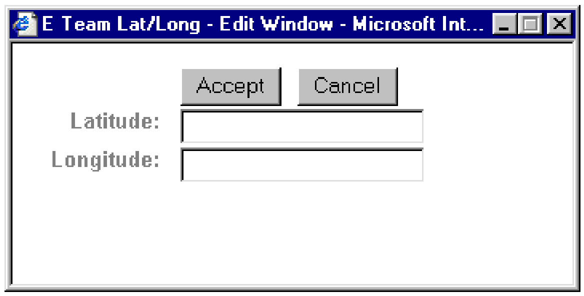

Figure 34 – E Team Lat/Long Dialog

2. Enter the Latitude and Longitude values in decimal degrees.
3. Click ***Accept*** which will close the window and geo locate the report on the map.

Map Overlays

What You Need To Know

- The ability to create overlays is determined by your access rights level.
- Overlays can ONLY be created from the read mode of a report.
- If your System Administrator has assigned you permission to perform this function, you will see the ***Create Overlay*** button on the read mode of reports with this feature.
- Overlays can be added to any map associated with a report.

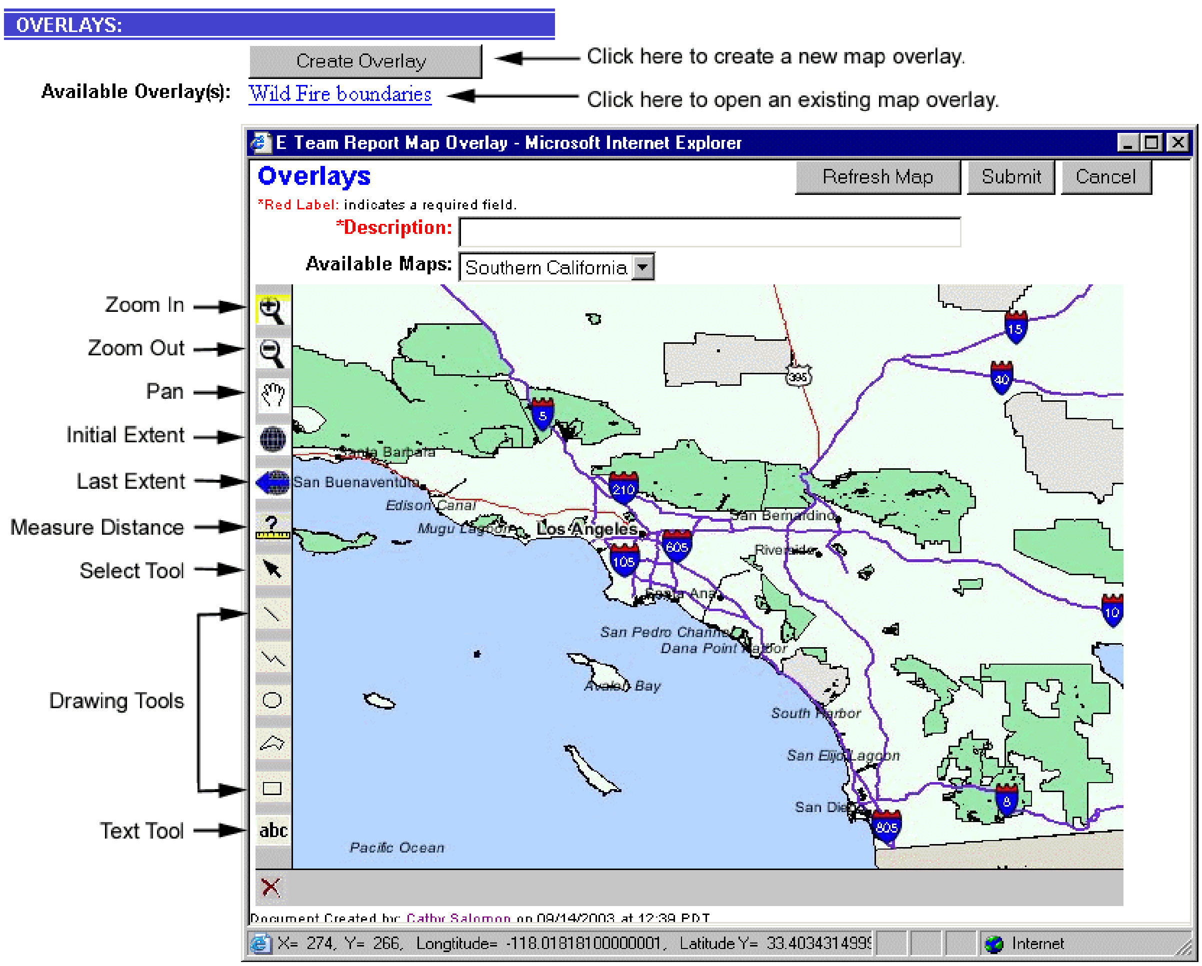

Figure 35 – E Team Map Overlay Window

Overlay Tools

At the left of the overlay window, as shown in Figure 35, is a tool bar. When appropriate, properties for each tool can be changed or viewed along the bottom of the Overlay window. A yellow border around the tool icon indicates the active tool. The status bar along the bottom of the map window displays latitude and longitude for the position of the cursor.

- **Zoom In -** To zoom in, click on the Zoom In magnifying glass with the plus sign; then go to the upper right or lower left corner of the area on which you wish to zoom in. Depress and hold down the left mouse button and drag the cursor to the corner diagonally opposite your area of interest. Dragging the cursor will cause a red box to appear. When you release the mouse button, the map will zoom to show the area of interest as defined by the red box you drew.
- **Zoom Out -** To zoom out, select the Zoom Out magnifying glass with the minus sign, then click until the map view you want has been displayed.
- **Pan -** To pan (move the image to the right, left, up, or down), select the pan hand icon. Next, move your cursor onto the map, depress and hold the left mouse button, and drag the cursor. Release the button when you have the desired view.
- **Initial Extent -** This is the default map view that displays the first time you click the Create Overlay button. Each time you use a map tool (e.g., pan, zoom in, or zoom out) or click on the Refresh Map button to change the map display, the system updates the extent. When you click on the Initial Extent button, the map display reverts to the default view. You can click on Initial Extent at any time while you are using the map if you wish to return to this default view.

> 🗁 **Each map in the Available Maps picklist has an initial extent defined during configuration of your E Team system.**

- **Last Extent -** Each time you use a map tool (e.g., pan, zoom in, or zoom out) or click on the Refresh Map button to change the map display in the Overlay window, the system updates the map extent. For example, when you pan from one area on a map to another, the map is updated to display the new area. When you click Last Extent, the display updates one step back to the prior map.
- **Measure Distance -** This tool allows you to measure the distance between any two points on the map. First, click on the origination point, and then double-click on the end point. E Team displays a window that shows the distance between the two points in miles and kilometers.
- **Select -** This tool allows you to select objects on the overlay. This tool will not be active until you have created an object or label on the overlay.
- **Line -** This tool allows you to draw a straight line. Click and drag from the start point and release at the end point.
- **Freehand Line -** This tool allows you to draw a freehand line. Click and drag from the start point and release at the end point.
- **Oval -** This tool allows you to draw an oval shape. Click and drag from the start point and release at the end point.

- **Polygon -** This tool allows you to draw a polygon in any shape. Click and drag from the start point to the next point in the shape, and then click at the next point. When the shape is complete, double-click.
- **Rectangle -** This tool allows you to draw a rectangle shape. Click and drag from the start point and release at the end point.
- **Text -** This tool allows you to enter text on your overlay. Click once and the system displays a text box with *enter label* displayed within the box. Just type and your text appears in place of the *enter label* text.
- **Delete -** This tool allows you to delete any object that you created on the map with your overlay tools. Click on the object to select it and then click on the Delete tool.

Creating Map Overlays

You can create a map overlay from any report that has a Location section. An overlay serves as a good planning tool, allowing you to communicate specific information on a map by entering additional data or hand-drawn details.

1. From the reports read-only mode, scroll to the *Overlays* section.
2. Click ***Create Overlay***.

   The Map Overlay window is displayed as shown in Figure 35.
3. Enter in a *Description/name* for your overlay. This is the name you will use in the future to access your saved overlay from the report.
4. Use the Available Maps picklist to change the map selected if necessary and then click on the ***Refresh Map*** button.
5. Use the overlay tools to create your overlay. When you have finished, click on the ***Submit*** button to save your overlay.

Viewing, Printing, Updating and Deleting Map Overlays

1. From the read mode of the report scroll to the *Overlays* section.
2. Click on an *Available Overlay(s)* document link to open the overlay.

   The Map Overlay window is display with the selected overlay in Read-only mode.

   ✓ Click ***Print*** to open a printable version of the map overlay, then click on ***Send to Printer*** to print.

   ✓ Click ***Update*** to make changes to the overlay. When you have finished, click ***Submit*** to save your changes.

   ✓ Click ***Delete*** to remove the overlay from the report.

🗁 **The deleted overlay file will no longer be listed as an attachment to this report, although it will remain accessible in History.**

   ✓ Click ***Cancel*** to close the window.

History

The History feature provides a way to access a copy of each document that has been saved in E Team. Since a record of the document is kept each time the ***Submit*** button is used, each and every change that was made to any report in the system is stored, providing users with a way to chronologically track the progression of a report from the time it is opened until it is closed.

To access History, select the ***History*** option on the left View/Update navigator. When using the Full Menu, this selection is found beneath ***References***.

Clicking on the History option causes a new window to open on your screen. From this window you can select the report type you wish to view in the left frame, then locate the report from the History View that opens in the right frame.

To close the History window, click on the ***Close History*** button located at the bottom of the left frame.

GETTING HELP

If you have any questions about E Team system requirements or the E Team installation process, please contact Customer Support:

Website: www.eteam.com

Email: support@eteam.com

Phone: (800) 209-2312

Fax: (818) 932-0661

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